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ABSTRACT

Developed as part of the Marine Corps Institute (MCI) correspondence training program, this course on supply management is designed to provide the supply chief with an understanding of the fundamental functions of supply management as it applies to a supply office. Introductory materials include specific information for MCI students, a course introduction, and a study guide (guidelines to complete the course). The 15-hour course contains four study units. Each study unit begins with a general objective. The study units are divided into numbered work units, each presenting one or more specific objectives. Contents of a work unit include a text and study questions/exercises. Answer keys are found at the end of each study unit. At the end of the course is a review lesson. Topics covered in the study units include functions of management (planning, organizing, directing, controlling), decision-making process, organizing and managing the supply office, and setting goals. (YLB)

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ARLINGTON, VA. 22222

30.20
19 Sept 1984

1. ORIGIN

MCI course 30.20, Supply Management, has been prepared by the Marine Corps Institute.

2. APPLICABILITY

This course is for instructional purposes only.

J. M. D. HOLLADAY
Lieutenant Colonel, U. S. Marine Corps
Deputy Director

INFORMATION

FOR

MCI STUDENTS

Welcome to the Marine Corps Institute training program. Your interest in self-improvement and increased professional competence is commendable.

Information is provided below to assist you in completing the course. Please read this guidance before proceeding with your studies.

1. MATERIALS

Check your course materials. You should have all the materials listed in the "Course Introduction." In addition you should have an envelope to mail your review lesson back to MCI for grading unless your review lesson answer sheet is of the self-mailing type. If your answer sheet is the pre-printed type, check to see that your name, rank, and social security number are correct. Check closely, your MCI records are kept on a computer and any discrepancy in the above information may cause your subsequent activity to go unrecorded. You may correct the information directly on the answer sheet. If you did not receive all your materials, notify your training NCO. If you are not attached to a Marine Corps unit, request them through the Hotline (autovon 288-4175 or commercial 202-433-4175).

2. LESSON SUBMISSION

The self-graded exercises contained in your course are not to be returned to MCI. Only the completed review lesson answer sheet should be mailed to MCI. The answer sheet is to be completed and mailed only after you have finished all of the study units in the course booklet. The review lesson has been designed to prepare you for the final examination.

It is important that you provide the required information at the bottom of your review lesson answer sheet if it does not have your name and address printed on it. In courses in which the work is submitted on blank paper or printed forms, identify each sheet in the following manner:

DOE, John J. Sgt 332-11-9999
08.4g, Forward Observation
Review Lesson
Military or office address
(RUC number, if available)

Submit your review lesson on the answer sheet and/or forms provided. Complete all blocks and follow the directions on the answer sheet for mailing. Otherwise, your answer sheet may be delayed or lost. If you have to interrupt your studies for any reason and find that you cannot complete your course in one year, you may request a single six month extension by contacting your training NCO, at least one month prior to your course completion deadline date. If you are not attached to a Marine Corps unit you may make this request by letter. Your commanding officer is notified monthly of your status through the monthly Unit Activity Report. In the event of difficulty, contact your training NCO or MCI immediately.

3. MAIL-TIME DELAY

Presented below are the mail-time delays that you may experience between the mailing of your review lesson and its return to you.

	TURNAROUND MAIL TIME	MCI PROCESSING TIME	TOTAL NUMBER DAYS
EAST COAST	16	5	21
WEST COAST	16	5	21
FPO NEW YORK	18	5	23
FPO SAN FRANCISCO	22	5	27

You may also experience a short delay in receiving your final examination due to administrative screening required at MCI.

4. GRADING SYSTEM

LESSONS			EXAMS	
GRADE	PERCENT	MEANING	GRADE	PERCENT
A	94-100	EXCELLENT	A	94-100
B	86-93	ABOVE AVERAGE	B	86-93
C	78-85	AVERAGE	C	78-85
D	70-77	BELOW AVERAGE	D	65-77
NL	BELOW 70	FAILING	F	BELOW 65

You will receive a percentage grade for your review lesson and for the final examination. A review lesson which receives a score below 70 is given a grade of NL (no lesson). It must be resubmitted and PASSED before you will receive an examination. The grade attained on the final exam is your course grade, unless you fail your first exam. Those who fail their first exam will be sent an alternate exam in which the highest grade possible is 65%. Failure of the alternate will result in failure of the course.

5. FINAL EXAMINATION

ACTIVE DUTY PERSONNEL: When you pass your REVIEW LESSON, your examination will be mailed automatically to your commanding officer. The administration of MCI final examinations must be supervised by a commissioned or warrant officer or a staff NCO.

OTHER PERSONNEL: Your examination may be administered and supervised by your supervisor.

6. COMPLETION CERTIFICATE

The completion certificate will be mailed to your commanding officer and your official records will be updated automatically. For non Marines, your completion certificate is mailed to your supervisor.

7. RESERVE RETIREMENT CREDITS

Reserve retirement credits are awarded to inactive duty personnel only. Credits awarded for each course are listed in the "Course Introduction." Credits are only awarded upon successful completion of the course. Reserve retirement credits are not awarded for MCI study performed during drill periods if credits are also awarded for drill attendance.

8. DISENROLLMENT

Only your commanding officer can request your disenrollment from an MCI course. However, an automatic disenrollment occurs if the course is not completed (including the final exam) by the time you reach the CCD (course completion deadline) or the ACCD (adjusted course completion deadline) date. This action will adversely affect the unit's completion rate.

9. ASSISTANCE

Consult your training NCO if you have questions concerning course content. Should he/she be unable to assist you, MCI is ready to help you whenever you need it. Please use the Student Course Content Assistance Request Form (ISD-1) attached to the end of your course booklet or call one of the AUTOVON telephone numbers listed below for the appropriate course writer section.

PERSONNEL/ADMINISTRATION	288-3259
COMMUNICATIONS/ELECTRONICS/AVIATION	
NBC/INTELLIGENCE	288-3604
INFANTRY	288-3611
ENGINEER/MOTOR TRANSPORT	288-2275
SUPPLY/FOOD SERVICES/FISCAL	288-2285
TANKS/ARTILLERY/INFANTRY WEAPONS REPAIR	
LOGISTICS/EMBARKATION/MAINTENANCE MANAGEMENT/	
ASSAULT AMPHIBIAN VEHICLES	288-2290

For administrative problems use the UAR or call the MCI HOTLINE: 288-4175.

For commercial phone lines, use area code 202 and prefix 433 instead of 288.

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MARINE CORPS INSTITUTE

STUDY GUIDE

Welcome to the Marine Corps Institute correspondence training program. By enrolling in this course, you have shown a desire to improve the skills you need for effective job performance, and MCI has provided materials to help you achieve your goal. Now all you need is to develop your own method for using these materials to best advantage.

The following guidelines present a four-part approach to completing your MCI course successfully:

1. Make a "reconnaissance" of your materials;
2. Plan your study time and choose a good study environment;
3. Study thoroughly and systematically;
4. Prepare for the final exam.

I. MAKE A "RECONNAISSANCE" OF YOUR MATERIALS

Begin with a look at the course introduction page. Read the COURSE INTRODUCTION to get the "big picture" of the course. Then read the MATERIALS section near the bottom of the page to find out which text(s) and study aids you should have received with the course. If any of the listed materials are missing, see Information for MCI Students to find out how to get them. If you have everything that is listed, you are ready to "reconnoiter" your MCI course.

Read through the table(s) of contents of your text(s). Note the various subjects covered in the course and the order in which they are taught. Leaf through the text(s) and look at the illustrations. Read a few work unit questions to get an idea of the types that are asked. If MCI provides other study aids, such as a slide rule or a plotting board, familiarize yourself with them. Now, get down to specifics!

II. PLAN YOUR STUDY TIME AND CHOOSE A GOOD STUDY ENVIRONMENT

From looking over the course materials, you should have some idea of how much study you will need to complete this course. But "some idea" is not enough. You need to work up a personal study plan: the following steps should give you some help.

(A) Get a calendar and mark those days of the week when you have time free for study. Two study periods per week, each lasting 1 to 3 hours, are suggested for completing the minimum two study units required each month by MCI. Of course, work and other schedules are not the same for everyone. The important thing is that you schedule a regular time for study on the same days of each week.

(B) Read the course introduction page again. The section marked ORDER OF STUDIES tells you the number of study units in the course and the approximate number of study hours you will need to complete each study unit. Plug these study hours into your schedule. For example, if you set aside two 2-hour study periods each week and the ORDER OF STUDIES estimates 2 study hours for your first study unit, you could easily schedule and complete the first study unit in one study period. On your calendar you would mark "Study Unit 1" on the

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appropriate day. Suppose that the second study unit of your course requires 3 study hours. In that case, you would divide the study unit in half and work on each half during a separate study period. You would mark your calendar accordingly. Indicate on your calendar exactly when you plan to work on each study unit for the entire course. Do not forget to schedule one or two study periods to prepare for the final exam.

(C) Stick to your schedule.

Besides planning your study time, you should also choose a study environment that is right for you. Most people need a quiet place for study, like a library or a reading lounge; other people study better where there is background music; still others prefer to study out-of-doors. You must choose your study environment carefully so that it fits your individual needs.

III. STUDY THOROUGHLY AND SYSTEMATICALLY

Armed with a workable schedule and situated in a good study environment you are now ready to attack your course study unit by study unit. To begin, turn to the first page of study unit 1. On this page you will find the study unit objective, a statement of what you should be able to do after completing the study unit.

DO NOT begin by reading the work unit questions and flipping through the text for answers. If you do so, you will prepare to fail, not pass, the final exam. Instead, proceed as follows:

(A) Read the objective for the first work unit and then read the work unit text carefully. Make notes on the ideas you feel are important.

(B) Without referring to the text, answer the questions at the end of the work unit.

(C) Check your answers against the correct ones listed at the end of the study unit.

(D) If you miss any of the questions, restudy the work unit until you understand the correct response.

(E) Go on to the next work unit and repeat steps (A) through (D) until you have completed all the work units in the study unit.

Follow the same procedure for each study unit of the course. If you have problems with the text or work unit questions that you cannot solve on your own, ask your section OIC or NCOIC for help. If he cannot aid you, request assistance from MCI on the Student Course Content Assistance Request included with this course.

When you have finished all the study units, complete the course review lesson. Try to answer each question without the aid of reference materials. However, if you do not know an answer, look it up. When you have finished the lesson, take it to your training officer or NCO for mailing to MCI. MCI will grade it and send you a feedback sheet listing course references for any questions that you miss.

IV. PREPARE FOR THE FINAL EXAM

How do you prepare for the final exam? Follow these four steps:

(A) Review each study unit objective as a summary of what was taught in the course.

(B) Reread all portions of the text that you found particularly difficult.

(C) Review all the work unit questions, paying special attention to those you missed the first time around.

(D) Study the course review lesson, paying particular attention to the questions you missed.

If you follow these simple steps, you should do well on the final. GOOD LUCK!

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SUPPLY MANAGEMENT

Course Introduction

SUPPLY MANAGEMENT is designed to provide the supply chief with an understanding of the fundamental functions of supply management as it applies to an FMF supply office.

ADMINISTRATIVE INFORMATION

ORDER OF STUDIES

Study Unit Number	Study Hours	Subject Matter
1	3	Functions of Management
2	2	Decision Making Process
3	2	Organizing and Managing the Supply Office
4	2	Setting Goals
	3	REVIEW LESSON
	3	FINAL EXAMINATION
	15	

RESERVE RETIREMENT CREDITS: 5

EXAMINATION: Supervised final examination without text or notes; time limit, 3 hours.

MATERIALS: MCI 30.20, Supply Management
Review lesson and answer sheet

RETURN OF MATERIALS: Students who successfully complete this course are permitted to keep the course materials.

Students disenrolled for inactivity or at the request of their commanding officers will return all course materials.

SOURCE MATERIALS

MCO P4400.124C	FMF SASSY Accounting Manual Volume III, Sep 1978
MCO P4400.126C	FMF SASSY Accounting Manual Volume V, May 1977
NAVTRA 10115	Military Requirements for Senior and Master Chief Petty Officer, 1977
	Marine Corps Service Support Schools, Curriculum, Jan 1980

HOW TO TAKE THIS COURSE

This course contains 4 study units. Each study unit begins with a general objective that is a statement of what you should learn from the study unit. The study units are divided into numbered work units, each presenting one or more specific objectives. Read the objective(s) and then the work unit text. At the end of the work unit text are study questions that you should be able to answer without referring to the text of the work unit. After answering the questions, check your answers against the correct ones listed at the end of the study unit. If you miss any of the questions, you should restudy the text of the work unit until you understand the correct responses. When you have mastered one study unit, move on to the next. After you have completed all study units, complete the review lesson and take it to your training officer or NCO for mailing to MCI. MCI will mail the final examination to your training officer or NCO when you pass the review lesson.

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STUDY UNIT 1

FUNCTIONS OF MANAGEMENT

STUDY UNIT OBJECTIVE: UPON SUCCESSFUL COMPLETION OF THIS STUDY UNIT, YOU WILL BE ABLE TO IDENTIFY THE FOUR FUNCTIONS OF MANAGEMENT: PLANNING, ORGANIZING, DIRECTING, AND CONTROLLING.

Enlisted personnel are not initially accepted into the Marine Corps as "managers." They do have some knowledge or skill that the Marine Corps develops to accomplish its mission. Eventually, some enlisted personnel who perform effectively are given positions of leadership. These major changes and challenges present some problems for most new managers. As a supply chief, the new manager soon realizes that the technical skills that he has mastered are insufficient in facing the multitude of situations which will demand solutions--not the text book solution, but the manager's own solution.

The supply chief has a variety of functions. These can be so numerous that at times there is a feeling of uncertainty and you may start to wonder why:

Why are there never enough people or time to accomplish a task properly?

Why, when I want something done right, I have to do it myself?

Why each day brings a new crisis?

Why everything piles up on me at one time?

Why are the people working for me technically deficient or lacking in enthusiasm?

There is no doubt about it, very few jobs are more difficult than that of a supply manager; however, there are few jobs more interesting. Supply chiefs will discover that an understanding of the management concepts, along with technical skills, will make the job more rewarding to the unit they support and to themselves.

Section I. PLANNING

Work Unit 1-1. PLANNING DEFINED

DEFINE PLANNING.

To be prepared for anticipated, routine, or contingency tasks is good planning. When reporting to a new command, the new supply chief will use certain available tools to establish a successful plan. Some of these tools are the unit's T/O mission, published training plans by the commanding officer's operations staff (S-3), non-published major projects or contingency plans for other areas of the unit, and pending projects within the supply support areas. In considering all of these samplings, a supply chief would define planning as "Where you want to go, how you are going to get there, and when will you arrive." When reporting to a new command, discussions should be held with the supply chief who is being transferred about the plans presently in effect that are vital to the unit. This will avoid disrupting efforts already underway.

EXERCISE: Answer the following question and check your answer against the one listed at the end of the study unit.

1. Define Planning.

Work Unit 1-2. CHARACTERISTICS OF A PLAN

LIST THE FOUR CHARACTERISTICS OF A BENEFICIAL PLAN.

The ability to make and carry out good plans is one of the most valuable assets a manager may possess. Competent planning ensures easy, smooth, and certain completion of the job. Good planning makes work easier, because the people to whom a task is assigned will know in advance where they are going, how they will get there, and when they should arrive. A beneficial plan also helps the personnel in your supply section to understand the overall plan and their place within it.

In formulating a beneficial plan, there are four characteristics that should be considered.

a. CLEAR DEFINITION: In planning for any action there can be only one major objective which must be clearly defined and understood before proceeding with anything else. The importance of the major objective may vary in size. It may consist in having to supply transactions, formulate a budget, issue assets, conduct an inventory, or you may have to conduct a major relocation of warehouse stocks. When the objective is clearly defined, not only can you visualize what is to be achieved, but you can also realize the resources such as people, equipment, time, facilities, and funds that will be required to achieve the objective.

b. SIMPLICITY: A plan doesn't necessarily have to be sophisticated or complex to be good. By keeping a plan as simple as possible, you will reduce confusion and aid those involved to understand more easily.

c. FLEXIBILITY: Even the best laid plans can be disrupted by events which could not be foreseen. To compensate for unexpected events, a plan should be flexible. Disruptions slow down the progress toward the completion of a good plan. Flexibility allows quick response to unforeseen obstacles and prevents the personnel involved in the plan from becoming discouraged. A good example of this is when the annual physical inventory is underway and a company enters the supply area requesting issue of individual equipment. The supply chief, by not anticipating this unexpected issue of equipment, is forced to stop the inventory process and issue the gear (if determined vital), then he has to start his count all over again. There are times when situations like this will occur; however, they can usually be avoided by first checking with supported organizations when in the planning stage.

In another situation for example while the supply organization was ambitiously packing and crating its assets on hand for deployment, customers were easily issued individual equipment, maintenance parts, etc. This was done because the supply chief through previous contact with its customers had become aware of their possible demands; therefore, he provided the warehouse chief with the requirements to be filled and at the same time he gave more flexibility to the pre-deployment packing plan.

Timing is another crucial factor in determining how flexible a plan must be. If deadlines for tasks are imposed and timing becomes a major factor, it should be made clear to the authorities who can adjust the priorities for supply operations and for support to its customers. Personnel affected by the change in timing or by other factors in a plan should be made aware of the situation as soon as possible to avoid unnecessary conflict.

d. ECONOMY: Cost is not only determined by the dollar value for accomplishing a plan, but it is also determined by the materials, equipment, time, and personnel required. In determining whether a plan is economical or not, you should consider the impact the plan will have on other routine or long range projects. The supply chief of 2nd Battalion is planning to replace a large portion of his mount-out boxes for his bulk storage units before deployment as a battalion landing team afloat. Is the plan too costly in dollars? Are there enough skilled personnel available to prepare the boxes? Is there enough time to assemble and waterproof the boxes, relocate the stock, update the locator decks, and revise the embarkation plan? Will materials handling equipment be available to move bulk storage containers while afloat? The questions the supply chief has asked himself are all objective in determining the economical advantages to planning.

EXERCISE: Answer the following question and check your answer against the one listed at the end of the study unit.

1. List the four characteristics of a beneficial plan.

   a. _____

   b. _____

   c. _____

   d. _____

Work Unit 1-3. LONG TERM PLANNING

STATE THE PERIOD OF TIME REQUIRED BY LONG TERM PLANNING.

NAME THE MANAGEMENT LEVEL CONCERNED WITH LONG TERM PLANNING.

Long term planning in the Marine Corps can be defined as follows. A long term plan is needed when it is necessary to attain a major overhaul or a new procedure or policy that is implemented over a long period of time. It can be with or without intermediate goals leading to its completion. A long range plan can bring a sudden change in procedures or policies or the introduction of new equipment.

Overall, a long rang plan relates to that which is to be achieved in the distant future. With the advent of the Marine Corps Unified Material Management System (MUMMS) in 1967, the Marine Corps started experiencing problems with a mechanized general support echelon which supplied material to a vast network of manually run using accounts. Therefore, the need for the Supported Activities Supply System (SASSY) arose and was consequently planned. This long range plan consisted of a high level supervision project that required the approval of the Commandant of the Marine Corps, in addition it required automatic data processing (ADP) hardware which had to be purchased after obtaining the approval of the Department of Defense. This plan took an excess of five years (common for long term planning) to be fully implemented; it contained intermediate goals which were reached before the total objective was accomplished. Like most long term plans it was done at higher levels of command (i.e. Division, Wing, CMC, or DOD levels).

EXERCISE: Answer the following questions and check your answers with those listed at the end of the study unit.

1. State the period of time required by long term plans.

   _____

2. Name the management level concerned with long term planning.

   _____

Work Unit 1-4. SHORT TERM PLANNING

NAME THE MANAGEMENT LEVEL CONCERNED WITH SHORT TERM PLANNING.

STATE THE PERIOD OF TIME ASSOCIATED WITH SHORT TERM PLANNING.

NAME THE LEVEL OF MANAGEMENT OF THE SUPPLY CHIEF.

Like long term plans, a short term plan may consist of major overhauls, new policies, procedures or the introduction of new equipment. However, the short term plan consists of those changes which are implemented at lower levels of control (i.e., regimental, battalion, or the supply section). Short term planning is normally completed on a day-to-day basis and it may last as long as a year. The period of time associated with short term planning is the immediate future. This plan often consists of simple refinements or improvements to make supply functions more effective and efficient. Short term plans for the supply section are based on the needs that the supply officer and supply chief can determine from annual and quarterly training plans, changes in unforeseen requirements, or changes in logistical support. An effective way for the supply chief to forecast a need for short term planning is to establish a constant liaison with the operations section at the various levels through his logistics chief (S-4). The supply chief's position is the level of management associated with short term planning; in other words a supply chief is a first line supervisor.

EXERCISE: Answer the following questions and check your answers against those listed at the end of the study unit.

1. Name the management level concerned with short term planning.

   _____

2. State the period of time associated with short term planning.

   _____

3. Name the level of management of the supply chief.

   _____

Section II. ORGANIZING

Work Unit 1-5. INTRODUCTION TO ORGANIZING

DEFINE ORGANIZING.

LIST TWO FACTORS WITH WHICH ORGANIZING IS SPECIFICALLY CONCERNED.

A manager may be able to devise excellent plans, but the assistance of subordinates is necessary to accomplish the objective. In order to work effectively toward the accomplishment of objectives, a structure of roles must be designed. This is the purpose of the management function of organizing.

Organizing is the process whereby a manager attempts to arrange elements into a whole of interdependent parts. For example, as discussed in planning, a plan may contain intermediate goals. These goals when properly assigned constitutes the organizing required for the attainment of the overall objective. Assignments of jobs and the relationship among people are two important factors which constitute organizing.

Job assignments should be clear and demand definite established duties. The supply chief should make assignments based on the capability of the individual. An individual's capability can be considered by the lack of rank, knowledge, technical skills, or any other weaknesses observed by the supply chief who assigns tasks to that individual.

To avoid misuse of individual strengths and weaknesses, the supply chief should organize keeping in mind the strengths and minimize the weaknesses of the individual. Also, the supply chief should ensure that the individuals assigned to jobs are aware of their own responsibilities and those of others to arrive at a complete understanding and timely execution of those responsibilities.

Job relationships among people, the second factor in organizing, are accomplished when each supply person understands his responsibility to his job assignment and his responsibility for direction and support of other personnel within the supply unit. Each individual should realize his place and responsibility within the plan. The supply person should know as much as possible about the status of others in the plan to better understand the importance of his function and the impact on the overall plan.

EXERCISE: Answer the following questions and check your answers against those listed at the end of the study unit.

1. Define organizing.

   _____

2. List two factors with which organizing is specifically concerned.

   a. _____

   b. _____

Work Unit 1-6. PRINCIPLES OF ORGANIZATION

LIST THE FOUR PRINCIPLES OF ORGANIZATION.

There are four principles which are the basis for a well run organization, they are: (1) unity of command, (2) span of control, (3) homogeneous assignments, and (4) delegation of authority. If a manager neglects to follow any one of the four principles, it is highly probable that problems will arise in the organization and will cause some degree of failure.

a. Unity of command. This principle of organization says, in effect, "No person should have more than one manager on any single function." However, this does not mean that any one person cannot report to more than one manager.

In other words, managers who have subordinates responsible for additional duties or another project must make sure that the individual is aware of his appropriate chain of command. The supply chief must honor his subordinates' chain of command outside his realm of authority so as not to disrupt or create confusion for the individual who is subordinate to him. For example, a Marine lance corporal may have been assigned regular duties as a warehouseman, but he will also have the additional duty of fire team leader to a tactical

contingency force, such as riot-control. If training commitments and vital supply operations conflict so that the lance corporal becomes confused as to whom he or she is obligated first, the supply chief should arrange a meeting or liaison within the chain of command for the individual. In no way should the supply chief allow the individual subordinate to determine or influence the solution of the conflict based on his personal desire. To ensure the effective operation of this principle of organization, unity of command, there are three steps that can be taken:

(1) Display a chart of your organization prominently. This will emphasize proper channels.

(2) Instruct the members of your unit to refer to you, the supply chief, anyone who has questions about any changes or orders involving his functions.

(3) Allow no exception to be made in unity of command.

The effective application of this principle by using the above methods will contribute towards the efficiency of your supply section.

b. Span of control. This principle pertains to the number of people one manager can supervise directly. It is very important to you, since there is only so much time in a day. Your energy is limited, and you can give your personal attention to only a certain number of activities. The supply officer and chief rely on their NCO's in managing a supply unit. The experience and abilities of your NCO's will play a vital role in how broad a span of control they can have within your supply unit. For example, if you have an NCO with very limited experience, it would be quite difficult for that NCO to supervise a large number of people performing a highly complicated job. On the other hand, if you have an NCO with experience and proven ability, you are able to broaden the number of people that can be supervised by that NCO. Other factors that should be given consideration are the distance between the manager and the subordinates, as well as the time period in which a job must be completed.

c. Homogeneous assignments. These are tasks that deal with all phases of a single job. It allows one Marine to see his complete role and the whole scope of one function in a supply operation. For example, if the CMR clerk is also assigned duties as the garrison property NCO, then he becomes the single point of contact within the supply office for property held by responsible units. This job includes processing all gains and losses of any type within the responsible units as well as inventory and reconciliation of those property accounting records. The clerk is the duty expert within this area of property control because the job emcompasses all the facets of accounting for property held by responsible units. If the job was divided among two or more clerks, none would be able to grasp the whole picture. In other words the person becomes acquainted with a function from start to finish and will derive from it personal pride and a sense of accomplishment. This principle doesn't remove the need for cross training so that others can fill in on routine jobs not being accomplished due to the absence of the regular person.

d. Delegation of authority. This principle is defined in brief in the Marine Corps Manual as granting authority to subordinates to assist in the performance of functions. However, the full responsibility for the performance of those duties is not delegated. The supply officer has full responsibility for the supply account. This responsibility is to the commanding officer of the unit. The supply officer in turn delegates the authority to the supply chief that is needed to properly execute and accomplish particular functions with supply operations. The supply chief further delegates authority and assigns responsibility which if properly issued, stimulates all the characteristics of planning (previously discussed), especially "span of control." In a supply unit delegation of authority should go no lower than a functional area where a supply NCO can normally exercise his authority as an NCO. For example, a sergeant and corporal working in an office and warehouse respectively would be delegated authority from the supply chief who would assist them in controlling their respective areas. This authority could not be delegated any lower in order to maintain a unity of command and span of control for the NCOIC of each functional area.

EXERCISE: Answer the following question and check your answer against the one listed at the end of the study unit.

1. List the four principles of organization.

   a. _____

   b. _____

c. _____

d. _____

Work Unit 1-7. LINE ORGANIZATION

LIST THE THREE ADVANTAGES OF LINE ORGANIZATION.

LIST THE TWO DISADVANTAGES OF LINE ORGANIZATION.

There are two basic types of formal organization which are used in the Marine Corps. They are: (1) line, and (2) line and staff. The paramount considerations for which type of organization structure should be used are the mission and resources available. The line organization is used in the supply element of a using unit (fig 1-1). This is mainly because of the small size of the supply element. In a line organization, each person is connected with a single line of responsibility to his superior. The subordinate is accountable to, and receives orders from, only one superior.

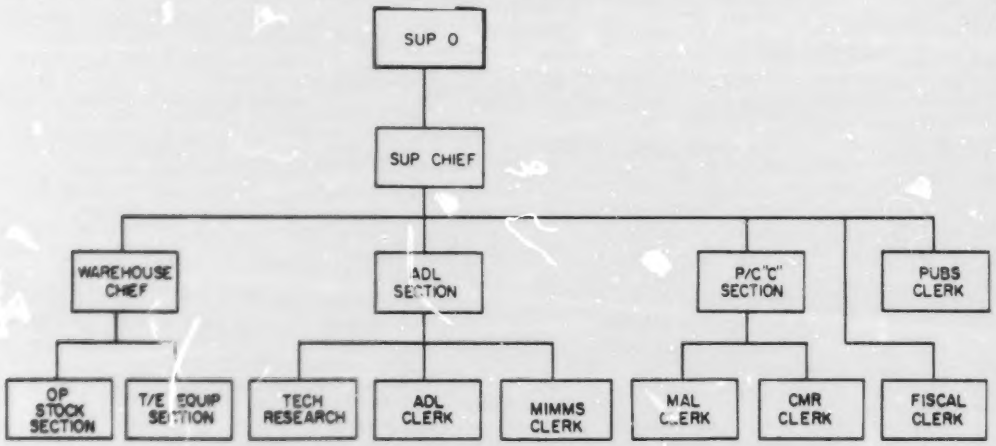


Fig 1-1. Supply element of a using unit.

a. There are three very distinct advantages in a line organization, they are; simplicity, clear division of authority, and fostering speedy action. Let's now discuss each of these advantages.

(1). Simplicity. The above organizational chart pertains to a supply element of a using unit. As you can see, it is a very simple structured organization; there are no intermediaries between the supply chief and the functioning elements; communication is direct, and each element knows its position within the organization.

(2). Clear division of authority. This is the distinct advantage of line organization. There is a straight line from the top manager to the functioning elements, and from each functioning element to the top manager. There is no doubt as to where authority lays in the organization. In the line and staff organization, which is covered later in the course, you will see just how much of an advantage this can be.

(3). Fosters speedy action. Many times you have seen a unit's productivity come to a complete stop because a question had arisen as to how a particular operation should be conducted because of a multitude of other reasons. In an organization structured under the line type, any stoppage in work usually occurs only for a short period of time, since the cause of any stoppage is brought directly to the manager's attention, he will make the decision to correct any problems.

b. A line organization has its disadvantages also. It denies the need for specialists and overburdens key personnel.

(1) Denies the need for specialists. In a line organization the occupational specialties of all personnel within the unit are directly related to the unit's mission. No specialists are available to perform supporting roles. For example, there are no embarkation specialists or clerk typists within a using unit supply section.

(2) Overburden key personnel. The lack of specialists causes personnel to perform tasks not related to their specialty. Because these tasks require supervision, key personnel must become knowledgable in all functions performed under their control, often requiring self-training and frequent research.

EXERCISE: Answer the following questions and check your answers against those listed at the end of this study unit.

1. List the three advantages of a line organization.

   a. _____

   b. _____

   c. _____

2. List the two disadvantages of a line organization.

   a. _____

   b. _____

Work Unit 1-8. LINE AND STAFF ORGANIZATION

LIST THE TWO ADVANTAGES OF LINE AND STAFF ORGANIZATION.

LIST THE TWO DISADVANTAGES OF A LINE AND STAFF ORGANIZATION.

A line and staff organization consists of a line organization plus a staff. In addition to the normal chain of command found in the line organization, there exist staff subordinate lines of coordination between the staff and the operational units. The staff consists of technical specialists who perform supporting missions to the units overall mission. the supply section is one of these supporting staff sections. The supply officer is a special staff officer to the commanding officer. The following paragraphs give two of the advantages of a line and staff organization.

a. Frees subordnate commanders of detail analysis. A large organization which has many complex functions requires managerial supervision for each functional area. It would be impossible for the battalion commander to handle all areas as a single manager; thus subordinate managers are employed to assist in the managerial duties of the top manager. Let's examine the following chart of a line and staff organization.

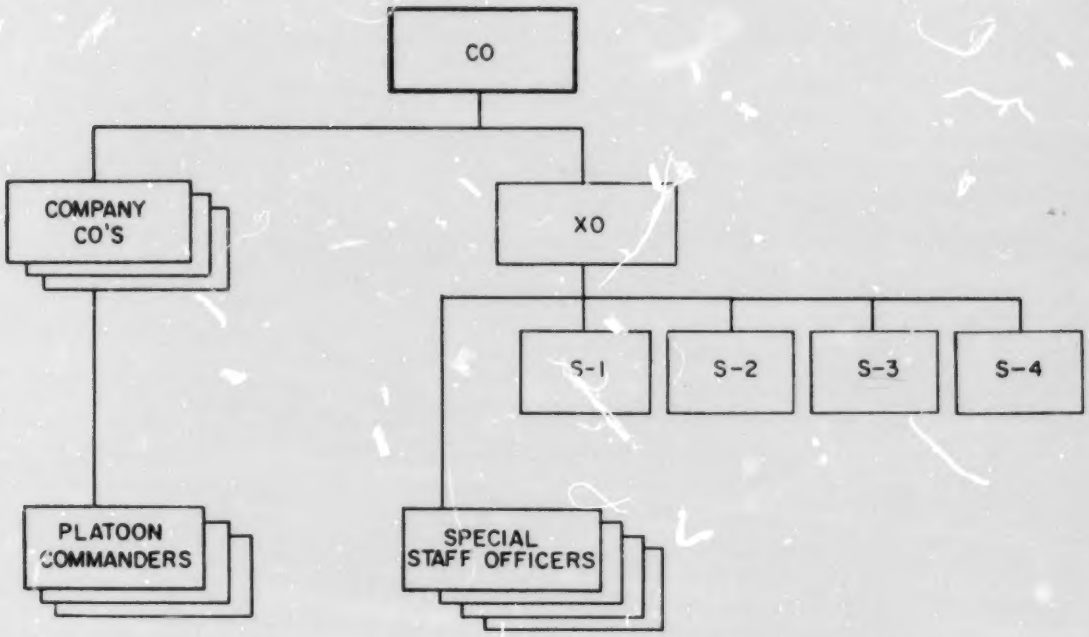


Fig 1-2. Line and staff organization.

b. Uses specialist's expertise. By assigning staff subordinates, the commanding officer can rely on their specialized expertise to carry out direct supervision in complex high volume functions. These areas, that need constant supervision, require skilled specialists to carry out that supervision.

Two disadvantages of a line and staff organization are:

a. Conflicts with line of authority. The staff subordinate line of coordination which exist within a line and staff organization can at times create a certain degree of confusion. Although the commander is the only individual in a position to issue orders to subordinate commanders, he frequently delegates "by direction" authority to his staff officers. The staff officers may then issue directions which may conflict with those issued by other staff officers unless care is exercised to closely coordinate this effort.

b. Precludes specialist from implementing action. As just discussed, any action taken by a staff officer must be coordinated with other staff officers prior to implementation. Additionally, staff action is also subject to approval by the commanding officer. Regardless of how technically proficient the staff specialist is or how urgent the requirement, it takes time to implement changes in policy or procedure.

EXERCISE: Answer the following questions and check your answers against those listed at the end of this study unit.

1. List the two advantages of a line and staff organization.

   a. _____

   b. _____

2. List the two disadvantages of a line and staff organization.

   a. _____

   b. _____

Section III. DIRECTING

Work Unit 1-9. INTRODUCTION TO DIRECTING

DEFINE DIRECTING.

STATE HOW A UNIT IS PUT IN MOTION.

As a manager, you have developed a plan and structured an organization capable of accomplishing the unit's mission. Now you should be directing. Directing is activating the unit into motion. This is accomplished by the issuance of orders or instructions. You, the manager, should also consider the provision of time for work related training. Orders should be clear, complete, and within the responsibility of supervising areas of the plan. Subordinates should report to the supply chief on the progress made toward reaching intermediate goals which are aimed toward the final objective.

Enough time should be provided for work related training and for accomplishing tasks, and yet there should be enough time left to allow for interruptions of routine matters that cannot be overlooked or stopped.

The term directing is commonly thought of as authoritative management. It is not necessary to consider this function (directing) as highly authoritarian. After the issuance of orders, the supply chief can encourage suggestions and ideas from subordinates or even allow the NCO's to exercise some degree of self-direction. However, the type of directing you provide depends upon how you operate and the skill and reliability of your subordinates.

EXERCISE: Answer the following questions and check your answers against those listed at the end of the study unit.

1. Define directing.

_____

2. State how a unit is put in motion.

_____

Work Unit 1-10. THE USE OF MOTIVATION IN DIRECTING

NAME THE ONE ESSENTIAL ELEMENT OF DIRECTING.

STATE THE PRIME DEMOTIVATOR IN DIRECTING PERSONNEL.

STATE THE PRIME MOTIVATOR IN DIRECTING PERSONNEL.

You know from personal experience that some tasks are not very desirable. You also know that people don't continually come to the job full of vigor. However, no matter whether the job is undesirable or the people just aren't up to it, the job must be done. Motivating becomes the one essential element in directing personnel towards their objective.

Not everyone is motivated towards organizational objectives in the same way. There are five factors that are the keys of motivation: achievement, recognition, advancement, the work itself, and responsibility. Let's take a brief look at each of these factors.

a. Achievement. There is nothing like success, and most people get a good feeling when they successfully complete a job.

b. Recognition. A worker that is recognized for doing a good job experiences a good feeling. Just a few words of praise from the boss can go a long way.

c. Advancement. This occurs when the individual is promoted in rank or position within the supply section. Junior or subordinate personnel envy the respected position of the ADL clerk. A warehouseman looks forward to achieving the position of controlling the purpose code "A" stock. Although this is a factor in motivation, the use of it is so infrequent for any one individual, that it can be considered a long range factor.

d. Work itself. The tasks itself or individual responsibility for a meaningful task can be a key factor. No one likes to think they are assigned "Keep busy type work." Just knowing your job has meaning to the overall operation can be a great motivator.

e. Responsibility. You often hear people talk of jobs they accomplished with little or no supervision, especially when they are responsible for the work of others. This factor probably has the longest term effect.

Just as there are factors that motivate, there are also factors which demotivate. The prime demotivator in directing people is a technically unqualified manager. As was stated in the beginning of this course, you are a manager because early in your Marine Corps career you performed effectively and demonstrated managerial abilities. Take a moment and reflect on whether or not you were initially technically qualified for every position you filled. You probably were not. However, you applied yourself and became technically qualified over a period of time. Just as it takes time to become technically qualified, it also takes time to lose this knowledge. This happens when you stop making an effort to maintain or increase your technical competency. How can a supply manager remain technically qualified? Of course the best way is to work daily in that technical field. Another way is for you to read as much about the changes and updated procedures in the supply field as you possibly can. For instance, the SMU's in the Marine Corps publish newsletters for the using units. Also, supply management assistance teams put out bulletins on new procedures and policies. These newsletters and bulletins are very helpful since they are geared for the manager who is in the field. To keep abreast of what is forcast for the future, a manager should attempt to get copies of the minutes from the supply officer conferences; also, he should review the Semi-annual Directives Checklist (MCBul 5215) for new changes and directives. This bulletin lists all of the latest orders and changes.

In your supply unit there are people seeking knowledge of many functions. They visualize an opportunity to advance in the Marine Corps or to well-paying civilian jobs in the future. They will one day do well because of the knowledge they obtained in the complex field of supply. This prospect is a tremendous asset to the Marine Corps, and you will become aware of this as you guide and motivate your personnel to obtain your objectives. You will discover that the prime motivator in directing is delegating authority. People who have been assigned responsibility remember the pride, the self-satisfaction and rewards obtained from accomplishing a mission through their own direction and control. Your judicious assignment of responsibility or delegation of authority is vital in developing subordinates into mature, knowledgeable supply NCO's and staff NCO's of the future.

EXERCISE: Answer the following questions and check your answer against those listed at the end of this study unit.

1. Name the one essential element of directing.

   _____

2. State the prime demotivator in directing personnel.

   _____

3. State the prime motivator in directing personnel.

   _____

Work Unit 1-11. DEVELOPING SUBORDINATES THROUGH ASSIGNMENT OF RESPONSIBILITY

LIST THE THREE ADVANTAGES IN DEVELOPING SUBORDINATES WHEN A MANAGER ASSIGNS RESPONSIBILITY.

LIST THE FIVE POSITIVE FACTORS THAT A SUBORDINATE SHOULD HAVE WHEN A MANAGER ASSIGNS HIM RESPONSIBILITY.

STATE THE ESSENTIAL CHARACTERISTIC A SUBORDINATE MUST HAVE TO OPERATE EFFECTIVELY.

A truism of management is that a manager never has time for things other than what he is working on. Because of this and to develop subordinates, a manager should assign as much responsibility as possible to his subordinates. At times you may feel that a subordinate does not have enough experience to handle a job. Even so, it is good management to assign tasks above the individuals capability. In most instances you will be surprised to find that the individual can perform a creditable job. Too often, managers tend to underestimate the abilities of subordinates and don't give them a chance to prove themselves. There are three advantages in developing subordinates by assigning them responsibilities. These are: skill, competence, and initiative. A person does not learn how to accept responsibility for a job by reading a book. Obviously, it is possible to acquire some knowledge of responsibility in this way, but development comes from a good deal of "hand on" application. In other words, one learns to be responsible for a job by being assigned the responsibility for a job. By being assigned responsibility the subordinate increases his skills and in time increases his level of competence. This increase in skill and competence will build up confidence to the point that the individual will begin to show initiative and come up with ideas to increase his effectiveness of the job he has been assigned.

Frequently, a manager runs into trouble in assigning responsibility because he gives little consideration to the job to be accomplished and the individual being assigned the responsibility for its accomplishment. To decrease the potential danger of error, there are five positive factors that subordinate should possess in relation to the task.

EXPERIENCE. The greater the probability of error in accomplishing a task, the more experience is required by the individual to whom the task is assigned.

COMPETENCE. Assigning responsibility based primarily on the experience of the individual can be a hidden danger. Many times people have had prior experience, but the results they achieved were less than satisfactory; therefore, the person being assigned responsibility should also be capable.

DESIRES RESPONSIBILITY. When you assign responsibility to an individual who has the desire to assume responsibility, you have already crossed a major hurdle. Realistically, you know that not everyone desires responsibility, but this can be overcome by exposing potential managers to a gradual increase in amounts of responsibility. This method insures the subordinate's successful accomplishment, and furthermore it builds his confidence.

NOT OVERLOADED WITH OTHER WORK. One of the major reasons a manager delegates responsibility to others is to lessen the workload on himself. Therefore, the manager should make certain that he doesn't assign responsibility to someone already overloaded with other work.

JUDGEMENT FACULTIES TO MAKE DECISIONS. If the task to be accomplished requires decision making on the part of the person given the responsibility to accomplish the task, the manager should ensure that the delegate possesses adequate judgement.

Few individuals will measure up to being outstanding in each of these positive factors, but having some degree of each is an indicator that he/she will be able to assume the responsibility and succeed. Even though a person may possess a high degree of these positive factors, there is one essential characteristic a person must have which he has no control over. He must have the manager's confidence. Without the confidence of the manager, subordinates will have a feeling of insecurity in accepting responsibility.

EXERCISE: Answer the following questions and check your answers against those which are listed at the end of the study unit.

1. List the three advantages in developing subordinates when a manager assigns responsibility to them.

   a. _____

   b. _____

   c. _____

2. List the five positive factors that a subordinate should have when responsibility is assigned to him.

   a. _____

   b. _____

   c. _____

   d. _____

   e. _____

3. State the essential characteristic a subordinate must have.

   _____

Work Unit 1-12. THE MANAGER'S ROLE IN ASSIGNING RESPONSIBILITY

STATE WHAT THE MANAGER MUST ENSURE THE INDIVIDUAL WHO IS ASSIGEND A TASK SHOULD HAVE.

STATE WHAT THE MANAGER MUST ALLOW FOR IN ASSIGNING RESPONSIBILITY.

DEFINE THE LIMIT TO WHICH A MANAGER MAY ASSIGN RESPONSIBILITY.

An individual may have all of the positive factors required for assuming responsibility, but unless the manager who assigns the responsibility makes sure that the individual has all of the relevant facts needed to successfully accomplish the task, the chance of failure is quite certain. For example, let's take the assignment of responsibility for loans of organic property to individuals or organizations on a temporary basis. At first this may seem like a very simple task, but if it is, why does it create as many problems as it does? What are the relevant factors of which an individual who has been assigned the responsibility for managing temporary loans must be aware? First of all he must know that under normal circumstances, a temporary loan of organic property to an individual or to an organization under another command is not authorized. In those instances, when a temporary loan of this nature is authorized, it is also required that the individual has authority to make the temporary loan. You also must perceive the danger to your organization if the individual to whom authority has been assigned is not aware of this fact. If items are issued to anyone requesting a temporary loan, your organization may not be able to recover the loaned property. Another relevant fact is the length of time property may be issued on temporary loan. Many people have the idea that temporary is indefinite. To an individual responsible for making temporary loans, temporary must mean 30 days from the date of issue; and on the 31st day, the loaned property must be returned on an extension of time must be granted by the

commanding officer (or his designated representative) of the organization exercising control over the supply account. Temporary loans should not be made to individuals who already have the same item on custody. The Equipment Custody Record Card (NAVMC 10359) should be utilized except when NAVMC 10576 or NAVMC 10577 is appropriate within the command. One most important factor would be to insure that the individual understands all possible circumstances that might arise.

The relevant factors that have been discussed regarding temporary loans may seem very basic to you because you know them, but keep in mind, when you assign responsibility to an individual, he usually won't have your technical knowledge or experience.

You, as a responsible manager, are not going to let a subordinate make a mistake that might cause problems. Continuous checks on the subordinate to assure that mistakes won't happen, will make the development of true responsibility impossible. Since everyone makes mistakes, a good manager must allow for mistakes to occur when he assigns responsibility. If a mistake is made, chalk it up to the personal development of your subordinates. This doesn't mean that you just shrug the mistakes off; serious or repeated mistakes can usually be avoided if you give careful explanation of objectives and policies as well as considerate counseling.

There is a myth that by assigning responsibility a manager can escape from his duties. When a manager assigns responsibility, he does not remove himself from being responsible since a manager is permanently responsible. You may only say that by assigning responsibility you have extended yourself through your subordinates. If you look for the positive factors, you are willing to allow for mistakes; and moreover limit the authority for decision making to that which is no further than your limit as a manager. The probability for success in assigning responsibility is then greatly enhanced.

EXERCISE: Answer the following questions and check your answers against those listed at the end of the study unit.

1. State what the manager must ensure the individual who is assigned a task should have.

_____

2. State what the manager must allow for, when he assigns responsibility.

_____

3. Define the limit to which a manager may assign responsibility.

_____

Work Unit 1-13. THE ADVANTAGE TO THE MANAGER IN ASSIGNING RESPONSIBILITY

STATE THE ADVANTAGE TO THE MANAGER WHEN HE ASSIGNS RESPONSIBILITY.

The major advantage of assigning responsibility is that it gives the manager more time for other tasks. Any manager can be more effective when he assigns duties, especially minor ones. As a manager, you are expected to be effective in the use of time, make a contribution to the organization, and set priorities. By assigning responsibilities, a manager is able to apply his time, which is a limited resource, to those areas that require his personal attention and thus he can best contribute to the management of his organization. For example, a SASSY using unit supply chief, to properly manage, should spend his time planning and coordinating for present and future priority tasks such as rewarehousing, annual inventory, deployment, and major reviews of excess dues on the loaded unit balance file. He should not spend his time working on day-to-day operations such as making issues, storing supplies in the warehouse, preparing demand transactions, breaking down computer output, and any number of other routine tasks.

EXERCISE: Answer the following questions and check your answers against those listed at the end of the study unit.

1. State the manager's advantage if he assigns responsibility.

_____

Section IV. CONTROLLING

Work Unit 1-14. CONTROLLING DEFINED

DEFINE CONTROLLING.

Controlling includes all of the devices that a manager uses to check on the work of his subordinates (direct observation, reports, records). Probably no other task of management causes as much resentment as controlling does. Control activities are often visualized in negative terms: reproof, correction, and surveillance. However, control is less sinister than viewed; it is a necessary part of the managerial process. In this course controlling is defined as a means by which to regulate the organization to ensure the achievement of goals and the completion of the plan. By being able to control, the manager can measure and correct the activities of subordinates to assure that the events conform to the plans. Thus, by controlling, the manager can measure performance against goals and plans, can show where negative deviations exist, and can place in motion the actions to correct the deviations. In addition, appropriate controls provide the manager with an impersonal tool for correcting mistakes and improving effectiveness. An example of an effective control tool is the Using Unit Performance Report which is produced each time the SMU processes an inventory update. Additionally, a cumulative monthly report is produced for the current month. By reviewing this report, the supply chief can readily determine how well his subordinates are performing. For example, the Unit Performance Report shows how many transactions were submitted to the SMU for processing, and how many of those transactions were rejected. Numerous rejects indicate that the clerks who submit the transactions don't know the proper procedure for filling out the transactions, and that more training must be provided to the clerks.

From the above example you can see that the Using Unit Performance Report is used in the controlling process to measure how well things are being done, and to take corrective actions by controlling what people do in order to have things properly controlled.

EXERCISE: Answer the following question and check your answer against the one listed at the end of this study unit.

1. Define controlling. _____

_____

Work Unit 1-15. CHARACTERISTICS OF ACCEPTABLE CONTROL

LIST THE THREE CHARACTERISTICS OF ACCEPTABLE CONTROL.

STATE WHAT DICTATES THE AMOUNT AND TYPE OF CONTROL TO BE USED.

STATE WHEN THE CONTROL FUNCTION IS IMPLEMENTED.

If maximum results are expected, controls should be simple, easily understood, and accepted as necessary. The amount of control over subordinates by the supply chief can be determined by the amount of experience of his NCO's. An experienced sergeant or corporal that has been delegated authority would require less control than that required by a less experienced NCO. Because of the complexities of plans, organizations, and personnel, the amount of control is determined by the unit's particular situation.

The amount and type of control should be tailored to the situation. Less experienced, less reliable, and uninterested subordinates usually require tighter control. On the other hand, excessively tight control over subordinates can slow down or disrupt ambitious subordinates. Control functions should be implemented during the performance of the task assigned. Visits by the supply chief to the place where tasks are being performed not only establish control, but assure subordinates of the chief's interest and concern, which can prove to be valuable to the control function.

EXERCISE: Answer the following questions and check your answers with those at the end of this study unit.

1. List the three characteristics of control.

   a. _____

   b. _____

   c. _____

2. State what dictates the amount and type of control to be used.

   _____

3. State when the control function is implemented.

   _____

Work Unit 1-16. TYPES OF CONTROL

LIST THE THREE MEANS OF CONTROL.

There are three means of control by which a manager can measure and evaluate the effectiveness of his subordinates' accomplishments toward organizational objectives.

Direct observation. This method is preferred only when the supply unit is small and the supply chief has enough time to become involved. Generally, small supply units with a lesser number of commitments and no major plans in process can afford the time the supply chief will need to directly observe the operations and thus exercise his control. A unit with a small volume of transactions can permit the manager to have time to oversee all major functioning areas (i.e. the warehouse and the office personnel).

Reports. In larger and more complex supply operations a manager would prefer reports, either oral reports or documented analysis received from the SMU. NCO's can report orally to the supply manager on the progress and the problems encountered in the plans being carried out. These NCO's with assigned responsiblity represent functional areas of routine duties, i.e. receipts control, purpose code "A" (operating stock), or the additional demands section. They can also represent an NCO in charge of a intermediate supervisor in directing a major plan. Reports in a form of documented reports from the SMU are readily available to the manager. Most useful to the supply chief are the "Unit Performance Report," the "Balance Analysis," and the Money Value Gain/Loss Report." These reports can greatly assist the supply chief in monitoring operations and transactions carried out by his subordinates.

Records. This type of control can be closely associated with reports. Like the reports discussed above, there are records maintained by the unit that can be utilized in the process of controlling. The reporting unit's Consolidated Memorandum Receipt record can be monitored by the supply chief to insure that the proper and timely custody signatures are being obtained. Local records can also assure the supply chief that the purpose code "C" clerk is making timely and correct posting to all custody accounts and the unit's allowance lists.

EXERCISE: Answer the following question and check your answer with the one listed at the end of this study unit.

1. List the three means of control.

   1. _____

   2. _____

   3. _____

SUMMARY REVIEW

Throughout study unit 1 you have been exposed to the major management functions which are vital to a manager's role in planning, organizing, directing, and controlling supply operations. As a supply chief of an organization, you can greatly enhance the overall supply effectiveness and provide more time for those functions that warrant your personal attention through the use of the four functional areas of management as shown in the study unit.

Answers to Study Unit #1 Exercises

Work Unit 1-1.

1. Where you want to go and how you are going to get there.

Work Unit 1-2.

1. a. Clear Definition
   b. Simplicity
   c. Flexibility
   d. Economy

Work Unit 1-3.

1. Commonly in excess of five years

2. Higher level of management

Work Unit 1-4.

1. Lower level of control

2. Immediate future

3. First line supervisor

Work Unit 1-5.

1. To arrange elements into a whole of interdependent parts.

2. Jobs relationship among people.

Work Unit 1-6.

1. a. Unity of command
   b. Span of control
   c. Homogeneous assignments
   d. Delegation of authority

Work Unit 1-7.

1. a. Simple
   b. Clear division of authority
   c. Fosters speedy action

2. a. Denies the need for specialists
   b. Overburdens key personnel

Work Unit 1-8.

1. a. Frees subordinate commanders of detail analysis
   b. Uses specialists expertise

2. a. Conflicts with line of authority
   b. Precludes specialists from implementing action

Work Unit 1-9.

1. Activating the unit into motion

2. By the issuance of orders or instructions

Work Unit 1-10.

1. Motivating

2. Technically unqualified manager

3. Delegating authority

Work Unit 1-11.

1. a. Initiative
   b. Skill
   c. Competence

2. a. Experience
   b. Competence
   c. Desires responsibility
   d. not overloaded with other work
   e. Judgement faculties to make decisions

3. Manager's confidence.

Work Unit 1-12.

1. All relevant facts

2. Mistakes

3. No further than the manager's limit of authority.

Work Unit 1-13.

1. The manager will have more time for other tasks.

Work Unit 1-14.

1. Regulating the organization to insure the achievement of goals and the completion of the plan.

Work Unit 1-15.

1. a. Simple
   b. Easily understood
   c. Accepted as necessary

2. Unit's particular situation

3. During the performance of the task.

Work Unit 1-16.

1. a. Direct observation
   b. Reports
   c. Records

STUDY UNIT 2

DECISION MAKING PROCESS

STUDY UNIT OBJECTIVE: UPON SUCCESSFUL COMPLETION OF THIS STUDY UNIT YOU WILL BE ABLE TO IDENTIFY AN EFFECTIVE PROBLEM SOLVING TECHNIQUE. IN ADDITION, YOU WILL BE ABLE TO IDENTIFY THE STEPS OF: DEFINING, ANALYZING, DEVELOPING ALTERNATIVE SOLUTIONS, CHOOSING THE BEST SOLUTION, DEVELOPING EFFECTIVE ACTION, AND USING FEEDBACK.

Work Unit 2-1. DEFINING THE PROBLEM

LIST THE THREE FORMS OF PROBLEMS THAT WILL CONFRONT A MANAGER.

STATE WHAT THE MANAGER MUST INITIALLY ACCOMPLISH BEFORE A PROBLEM CAN BE DEFINED.

NAME THE TWO TYPES OF DATA ASSOCIATED WITH PROBLEM SOLVING.

Whether you are a manager of a large service support unit or smaller using unit, you will be continuously investigating nonroutine exceptions. In addition, you, as manager, will be confronted with three forms of problems. These problems, which will be discussed in the following paragraphs, are essential in continuing (without disruptions) the steady flow of the large number of transactions processed. It is important for a manager to first be able to identify the type of a problem and secondly be able to develop solutions.

Personnel. Personnel problems can usually be divided into two general categories. The first of these is personnel shortages. Your unit may be operating below T/O strength or may suffer from a temporary shortage due to guard duty, leave, or similar causes. You will find it difficult to get more clerks, but you can minimize the impact on operations by exercising your skill as a manager.

The second category is personnel ineffectiveness. A Marine may be ineffective due to fatigue or illness, or due to a personal problem which impacts on his morale. To deal with this type of personnel problem, the manager must draw upon leadership skills.

Breakdown in operations. This type of problem causes the normal flow of business to be disrupted. When problems seem to compound themselves, whether they pertain to personnel or other circumstances, it takes management decisions to correct them; decisions that must be made by the manager. Normally a breakdown in operations results from the fact that the various functional areas are not cooperating when neccessary to complete a task, goal or objective. Any functional area not performing its duties on time causes other functional areas to stop and wait until the delayed transactions become available. This type of breakdown in operations may cause a dispute among NCOs in charge of functional areas, therefore the manager must step in and resolve the problem.

Inefficiency. Inefficiency occurs when the desired number of transactions to keep pace with supply business are not produced. This problem prevents a smooth flowing supply operation. Inefficiency is common when a clerk or warehouseman who must submit a large number of coded transactions that demand accuracy finds his job tedious. Inaccurate transactions can cause much delay and repeated work.

An example of inefficiency occurs when there are exceptionally large backlogs. When the reason for these backlogs cannot be related either to a breakdown in operations, personnel, training commitment, or other unit involvement, then inefficiency is normally the cause of the problem.

The basic solution to any problem is to take corrective action. However, to make the right decision on which corrective action to take, you, as a manager, must first gather all the relevant data. In gathering this data, you must learn or develop a systematic approach to problems. Your success in solving problems will determine the confidence your subordinates will have in your ability to solve future problems. Your subordinate's confidence in you to be able to define, analyze, and resolve problems logically is necessary so that they will come to you with other problems. Too many managers, from time to time, say that they don't want to hear the petty problems of their troops. However, when considering a problem, you will become aware that only the manager can determine if the problem is minor or warrants his attention. This does not mean that certain designated problems are not the responsibility of NCO's or functional area supervisors.

The chain of command should be used to allow problems to be solved at the lowest possible level. The chain of command allows the individuals that have been delegated authority or assigned responsibility as supervisors the opportunity to solve problems within their realm of authority. Subordinates will always seek policy and guidance from the same level of authority when the chain of command is used properly; thus, there is less chance of conflicting guidance that might derive from different sources. No supervisor or individual in the chain should allow individuals out of the chain to disseminate conflicting direction or guidance within their responsible area. A properly run chain will always refer problems up the chain so as not to involve those that need not be invovled unless truely warranted.

Many managers often sense that their subordinates observe and analyze their decisions. Your subordinates will look up to you more favorably if you demonstrate that you are capable of sorting the two types of data associated with problem solving; these are facts and opinions. By being able to look upon all relevant data concerning a problem and by quickly determining what is fact and what is opinion, a manager is able to analyze the problems objectively. This also builds the confidence that your subordinates will have in your ability to resolve problems without emotional bias. Keeping in mind, as a manager, that not all problems have quick, ready solutions, a manager must avoid letting a problem continue after he has made his initial investigation. Keeping your subordinates aware that you recognize the problem, updating them as to your course of action (when warranted), and following through will enhance their confidence in your ability to solve problems. In addition, by conducting regular meetings with the personnel of the supply section, a supply manager can inform his subordinate personnel of new and continuing plans, receive constructive suggestions for improving existing policies, and create interest on the part of all personnel in the supply section. When conducted properly, meetings also stimulate morale and reassure personnel of their part or role in the supply section.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. List the three forms of problems that will confront a manager.

   a. _____

   b. _____

   c. _____

2. State what the manager must initially accomplish before a problem can be defined.

   _____

3. Name the two types of data associated with problem solving.

   a. _____

   b. _____

Work Unit 2-2. ANALYZING THE PROBLEM

STATE THE THREE POINTS OF PROBLEM ANALYSIS.

After a manager determines the type of problem and separates fact from opinion, he must consider three vital points in analyzing the problem. First, the manager needs to determine specifications. In doing so, the manager uses the facts gathered to further determine the effect on accomplishing the task, goal, or objective.

An example of this would be when your additional demands clerk comes to you and states that he cannot reconcile with a particular responsible unit. The reconciliation of additional demands are vital for the completion of other transactions throughout the supply unit, such as expending or deobligating fiscal funds. Your research determines the following specifications: (1) the demand list is not being reconciled, (2) the RU is being represented by a different individual each time it is scheduled, (3) each individual does not completely understand reconciliations or what was done during previous reconciliations.

Once specifications have been determined, it is time for the manager to move on to the second point in analyzing the problem. The second point is to determine who must be consulted. For example, in the reconciliation of additional demands, the supply manager would consult the OIC or NCOIC of the responsible unit. In consulting the unit, the understanding of the specifications by both partners will create the desire to correct the problem. However, with problems where complete cooperation or understanding cannot be attained, it is necessary to follow the chain of command.

Always keep in mind that managers of supply units, maintenance shops, and other supported units, all have one objective in common and that is the accomplishment of the mission. They all consider their mission of overriding importance. When consulting another section head or unit, the supply manager should outline and stress the impact of the problem on supply support and the unit's mission. In determining who must be consulted, you may, at times, find it necessary to consult the higher echelons of the support units. Many problems, in transacting supply matters, involve the various commodity areas at the SASSY Management Unit. Every supply chief should make it a point to walk through the service support activity for his organization and thus become aware of the functions performed there which may have an effect on the unit's capability to accomplish its mission. By becoming aware of the functions or responsibilities of the service support unit, you can determine quickly who to consult for the technical support needed to solve a problem.

The third and final point of problem analysis is determining who must make the decision. Most decisions are made by the supply manager. However, exceptions can be made if the supply manager has entrusted a capable NCO with the responsibility for supervising and controlling particular matters. The supply manager should make swift and effective decisions to correct all problems that specifications show are in the supply unit. In matters other than those that require action through the chain of command for supply operations and parent command down to the supported units, the supply manager should depend upon the supply officer to use his authority and initiative.

EXERCISE: Answer the following question and check your response against the one listed at the end of this study unit.

1. State the three points of problem analysis.

   a. _____

   b. _____

   c. _____

Work Unit 2-3. DEVELOPING ALTERNATIVE SOLUTIONS

STATE WHY A MANAGER SHOULD ATTEMPT TO DEVELOP MORE THAN ONE SOLUTION TO A PROBLEM.

DESCRIBE WHAT DEVELOPING ALTERNATIVE SOLUTIONS FORCES MANAGERS TO DO.

LIST THREE SOURCES A MANAGER CAN UTILIZE TO DEVELOP ALTERNATIVE SOLUTIONS.

Rare is the problem facing a service support manager that cannot be solved in any of a variety of ways. With this in mind, a wise manager should attempt to find the most favorable solution. Before developing a detailed working solution, a manager should attempt to develop several alternative solutions. Each solution should have reasonable potentials for solving the problem. In each solution, cost, time, and resource requirements must be considered. From these alternative solutions, a manager can select a plan which meets the requirements and yields the most advantageous course of action under current operating conditions. Keep in mind that if none of the alternative solutions alone will produce the desired effect, you can then develop a solution using a combination of possible alternatives.

No specific criteria is used in evaluating alternative solutions, since specific requirements and support vary from one situation to another. The manager frequently starts by determining who must be consulted. In analyzing a problem, the comparison of the results along with the estimated cost in time, material, and personnel is the most important factor in determining the best alternative solution.

The need to solve the problem is the ultimate goal in selecting the best solution; however, a good solution represents a compromise between the manager's desire for precision and the need for flexibility as discussed in planning. A manager should avoid selecting a solution to any problem that does not allow the capability of adjustment. When helping subordinates to solve problems, the manager should let them know that circumstances may change and that his recommendations may also need to be changed. Understanding why solutions may change will increase the subordinates' confidence in the manager.

Before putting a solution into operation it is desirable to pretest it so that any major difficulties can be detected and corrected. Although at times testing can be difficult, there are several approaches that are feasible. In some situations it is possible to test a solution's effectiveness by simulating the operation of the solution. Let's consider, for example, a solution for correcting a problem in the inventory control system. Using historical data, you may give a dry run to the solution. In case of large problems where detailed change may exist, the operation of the solution could be studied for weaknesses under simulated conditions, and the results compared with the existing system.

If the actual simulation is impossible, the manager must go through a mental simulation process. He should consider a possible flow chart with which to arrive at the solution, step by step, carefully checking the need for and the flow of all input and output data relative to the activities involved to obtain the solution.

Up to this point the discussion has been based on problems that can be solved in various ways. However, in attempting to solve problems, a manager should first determine the type of problem, then separate opinion from fact, and then gather all relevant data to ensure that the perceived problem is in fact a real problem. The manager should also develop alternative solutions to the problem. Often when confronted with a problem, managers see what at first seems to be the obvious answer to the problem. However, that obvious answer or the either/or solution could be misleading. To avoid this miscalculation, the manager should develop alternative solutions in addition to the first thought misleading solution or the either/or solution.

When developing alternative solutions, managers are often their own best source from which possible solutions can be derived. This may be considered a feather in their hat. The supply manager, in fact, possesses experience, which leads to logical thinking, and creativity. All three sources can be utilized by the manager to develop alternative solutions. For example, when gathering relevant data for a problem solution, a manager might remember that the current problem is similar to one that he has solved or dealt with in the past. Because of the similarities, the manager may be able to use his past experience in developing the solution for the new problem. The data that the manager collects could possibly show a trend; a trend that the manager may have dealt with in the past when he was a manager or even as a clerk. This past experience can now assist him in his systematic and logical approach to develop alternative solutions.

If a manager is confronted with a new problem area, his experience and resourcefulness in solving other problems may help him to use a combination of elements to find a solution. In doing this, the manager is using his creativity developed through years of experience. So every manager whether experienced with smaller operations or larger complex units should not hesitate to utilize experience, creativity, and logical thinking to resolve problems through development of alternative solutions.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. Why should a manager attempt to develop more than one solution to a problem?

   _____

2. What does developing alternative solutions force a manager to do?

   _____

3. List the three sources a manager can use to develop alternative solutions.

   a. _____

   b. _____

   c. _____

Work Unit 2-4. CONSTRAINTS AND BARRIERS TO MANAGEMENT DECISIONS

LIST THREE CONSTRAINTS THAT LIMIT A MANAGER'S DISCRETION IN DEVELOPING ALTERNATIVE SOLUTIONS.

LIST TWO BARRIERS TO A MANAGER'S CREATIVITY.

In searching for alternatives, managers face certain constraints that limit them. These constraints eliminate certain choices that would otherwise be possible. The most common constraints are authoritative, material, and fiscal. The manager of a using unit usually knows better than anyone else in the unit what problems he faces and what needs to be done to overcome these problems. He has the best understanding of the conditions surrounding his work. The manager knows the people involved, sees the need for action, and urgently needs to take the action called for by the situation; but many times he is prevented from solving the problems because of decisions and directives from higher authority. This is not only true for supply managers; it is also true throughout the military establishment and civilian business world.

Material constraints are those which limit the action possible in a problem solution. For example, the lack of space for storage of supplies and T/E equipment, insufficient materials handling equipment, or a lack of time or personnel may be restrictive to a manager who is trying to develop the most favorable solution. By using the creativity possessed by most experienced managers, the manager can develop an effective solution in the most adverse conditions.

Fiscal constraints are not peculiar to Marine Corps managers, they are constraints that are world-wide. That is why, when developing alternative solutions, the cost of the various solutions must be considered to determine which is the most fiscally sound. An example of this could be the consolidation of runs to pick up supplies and other business of the unit, thus cutting back on nonessential materials in order to procure more essential supplies with justified usage data.

The authoritative, material, and fiscal constraints which limit a manager's discretion are imposed upon a manager by external sources. It should be obvious there isn't much that a manager can do to broaden his sphere of influence; however, a manager should concentrate on eliminating internal barriers which greatly effect his ability to creatively develop possible solutions. Two of these barriers which most often are generated by the manager himself are fear and habit.

When managers are afraid of making mistakes, their ability to reach a solution is impaired. Fear becomes an obstacle, it disrupts positive planning and willingness to fully develop alternative solutions to problems. Fear demotivates and slows down a manager who would otherwise attack his tasks conscientiously. Fear generates a feeling of unsureness each time he makes a decision. The only fear a good manager should allow himself is the fear of inaction. When facing severe problems, it is better to do something than nothing at all, even if it's wrong.

Habit stems from permitting yourself to utilize only experience. Being aware of your habits and thus developing alternative solutions through creativity, will make your position as a manager more meaningful and self-rewarding.

Both fear and habit can be reduced by becoming knowledgeable of all directives and orders on supply matters before attempting a particular task. Then the manager must use that knowledge to establish positive communications with his superiors when he is defining local requirements. An example of this would be the supply chief knows that deployment is scheduled and therefore researches through applicable directives for embarkation tactical markings before he asks the unit embarkation OIC for local requirements.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. List the three constraints that limit a manager's discretion in developing alternative solutions.

   a. _____

   b. _____

   c. _____

2. List the two barriers to a manager's creativity.

a. _____

b. _____

Work Unit 2-5. CHOOSING THE BEST SOLUTION

STATE THE TWO QUESTIONS A MANAGER MUST ANSWER IN CHOOSING A SOLUTION.

STATE THE TWO PRIMARY CONSIDERATIONS IN CHOOSING THE BEST SOLUTION.

STATE THE ESSENTIAL QUALITY IN SELECTING THE BEST SOLUTION.

You have gone step by step through an analysis of a problem and proposed alternative solutions. Now you must choose. To ensure that the solution chosen is the best possible, you should ask yourself two questions: first, will this solution solve the problem, and secondly, do I have the means to do this. If the answer is yes to both questions, then you should proceed to add up the cost. Any other solution which contains a yes answer should not be discarded, because, if the execution of the selected solution proves unfavorable, a part or all of it should be replaced by an alternative solution.

The primary considerations in choosing the best solution should be how to obtain the greatest result and how to expend the least effort. This is simple economy--how to get more for the money. The essential quality required in selecting the best solution is that the solution must be flexible. The selected solution must be flexible enough to achieve the greatest results by expending the least amount of effort. Let's now examine how this can apply to a routine problem.

Your purpose code "C" clerk has a problem in accounting for individual equipment. You begin by gathering data and defining the problem. Transactions which have been submitted are examined for accuracy. You verify the inventory accuracy for items on hand and reconcile the custody records. At this point, you determine that critical shortages exist. You list several possible solutions.

a. Reprogram funds to replace critical items.

b. Check for excesses among other units.

c. Borrow items from other units to support critical operations.

d. Request additional funding for the shortages.

By examining these alternatives, you decide to use a combination of all four. First, you borrow critical items in order to support the training exercise that will take place the following week. Second, you call on other supply chiefs to locate excesses. Third, you consult with the supply officer to decide what funds can be reprogrammed, and what additional funding will be required.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. What are the two questions a manager must answer in choosing a solution?

a. _____

b. _____

2. What are the two primary considerations in choosing the best solution?

a. _____

b. _____

3. State the essential quality required in selecting the best solution.

_____

Work Unit 2-6. USING FEEDBACK

DEFINE FEEDBACK.

LIST TWO METHODS OF OBTAINING FEEDBACK.

STATE THE THREE THINGS FEEDBACK TELLS A MANAGER.

Responsible NCO's play an important role in the accomplishment of tasks, goals, and objectives. This relieves the manager from some of his tasks and he can thus devote his attention to other matters. However, the manager should maintain his involvement in all tasks by using the controlling factor of feedback. Feedback is the manager's means for finding out how the solution is working. Feedback can be used to maintain control, remove distortion, and provide the opportunity to select any options or alternative solutions that become more favorable.

There are two methods for obtaining feedback. One is that the manager conducts personal checks on the individuals directed to resolve the problem. This personal check is not the most desirable because of the amount of time required of the manager; however, it may be necessary when the tasks assigned to individuals are larger and more complex.

A manager must determine the level of experience and capability of the individuals assigned to perform the task. If the NCO is knowledgeable, experienced, or has those leadership traits necessary to carry out a task assigned, then the supply chief would prefer periodic reports from that NCO. This is the preferred type of feedback, since the supply chief may, in this manner, accomplish three important objectives: provide training and experience to the NCO, free the manager to carry out other tasks, and accomplish the mission of problem solving.

Whether personal checks or periodic reports are used by the supply chief, there are three points that feedback provides the manager. First, is the decision the right one? This can usually be answered by the manager when the NCO reports that plans are on schedule and no problems have been found. Second, are desired results being achieved? The manager should reexamine the solution to determine from feedback whether or not the results are being achieved. As intermediate goals are reached, it may be determined that a different solution would be best suited to further fulfill the task. Timely periodic reports or personal checks are important. Third, is additional action required? Even after modifying solutions during the course of directing, additional action may be required to complete the task or correct other problems that may have been generated.

Let's now examine a situation that involves all that has been said thus far.

As a new supply chief in an infantry battalion who has just completed a successful tour of independent duty with a reserve unit, you are very busy reviewing something you have not been involved with for years or may have never confronted before -- something called SASSY. You should realize that telling the supply officer or the S-4 that you are slow in performing or unqualified is only a "cop-out". You examine all that is going on around you, conduct interviews with personnel from each functional area, and visit personnel of service support units, such as the SMU. In an attempt to gather all the knowledge you can, you begin to realize that as a manager you cannot cover all the bases. This is when you realize that your planning, directing, and controlling functions must be employed to dispense proper training and the right blend of assigning responsibility to NCO's. You are then left to deal with exceptions; however, you don't want to sit back and wait for problems to arise. Therefore, you start improving the efficiency of your unit's operation. You assign qualified subordinates to responsible positions, you conduct cross training and hold meetings with personnel to determine for their and your benefit the progress attained and to form new plans. Suddenly a problem is uncovered and a decision has to be made. The problem involves all the new mount-out boxes that had been prepared by your predecessor and that have not been marked with the unit's embarkation numbers. Deployment is only a month away, and your immediate attention must be devoted to a FSMAO visit which is coming before deployment; you must act soon. At this point you identify the actual problem by using the orders pertaining to embarkation and the discussions with the embarkation officer or embarkation NCOIC. After gathering all relevant data, you analyze the problem by defining specifications. For example, what work actually has to be done, what supplies are needed. From there you go further and develop good practical alternative solutions. Once your decision has been reached and approved by the supply officer, you must put all the wheels in motion; you must assign a responsible NCO from the warehouse to carryout your plans.

You appoint a minimal amount of support personnel to carry out the task of correcting the problem so that you will not interfere with the progress of other personnel in the warehouse who are preparing for the FSMAO visit. Your personnel realize your sincerity and the importance of their role from the discussions you have had with them. The NCO who has been assigned the responsibility for accomplishing the task is motivated by the responsibility and trust the supply chief has imposed upon him, and thus will strive to achieve his goals.

At the same time the supply chief can continue to monitor the progress for the FSMAO visit. As instructed, the NCO makes periodic reports to the supply chief and carries out changes in plans to complete the task. Finally, when the NCO has accomplished his task, he will experience a great feeling of accomplishment for a job well done as noted by the supply chief, and he will be ready for more and greater responsibility. The supply chief, while supervising his personnel, will always be available and responsive to his seniors.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. Write out the definition of "feedback".

   _____

2. What are the two methods for obtaining feedback?

   a._____

   b._____

3. What three things does feedback tell a manager.

   a._____

   b._____

   c._____

SUMMARY REVIEW

In this study unit you have learned to identify an effective problem solving technique. However, no problem solving technique can be said to be mistake-proof. But, you will realize that by using the techniques described here and the three resources of experience, logic, and creativity that you as a manager have developed through the years of supply background, you can broaden your skills in the decision making process.

Answers to Study Unit #2 Exercises

Work Unit 2-1.

1. a. Personnel
   b. Breakdown in operations
   c. Inefficiency
2. Gather relevant data
3. a. Facts
   b. Opinions

Work Unit 2-2.

1. a. Define specifications
   b. Determine who must be consulted
   c. Determine who must make the decision

Work Unit 2-3.

1. Most problems can be solved in various ways and the manager must attempt to find the best solution.
2. Avoid the frequently misleading obvious solution or the either/or solution.
3. a. Experience
   b. Logic
   c. Creativity

Work Unit 2-4.

1. a. Authoritative
   b. Material
   c. Fiscal
2. a. Fear
   b. Habit

Work Unit 2-5.

1. a. Will this solve the problem?
   b. Do I have the means to do this?
2. a. Greatest results
   b. Least effort
3. It must be flexible

Work Unit 2-6.

1. Means by which one can find out how the solution is working
2. a. Personal checks
   b. Periodic reports
3. a. Is the decision the right one?
   b. Are desired results being achieved?
   c. Is additional action required?

STUDY UNIT 3

ORGANIZING AND MANAGING THE SUPPLY OFFICE

STUDY UNIT OBJECTIVE: UPON SUCCESSFUL COMPLETION OF THIS STUDY UNIT YOU WILL BE ABLE TO IDENTIFY VARIOUS FACTORS TO BE CONSIDERED IN THE PHYSICAL ARRANGEMENT OF AN OFFICE. IN ADDITION, YOU WILL BE ABLE TO IDENTIFY THE MAJOR CAUSE OF BACKLOGS IN PAPER FLOW, AND THE USE OF TECHNIQUES TO ASSIST IN ALLEVIATING PAPER FLOW BACKLOGS. YOU WILL ALSO BE ABLE TO IDENTIFY THE CHANNELS OF INTERNAL AND EXTERNAL COMMUNICATION, THE DOMINANT MODE OF TRAINING PERSONNEL, AND THE STEPS TO AN EFFECTIVE TRAINING PROGRAM.

Work Unit 3-1. PHYSICAL ARRANGEMENT

DESCRIBE WHY DESKS SHOULD BE STRATEGICALLY PLACED WITHIN THE OFFICE.

STATE WHERE OFFICE EQUIPMENT SHOULD BE LOCATED.

LIST THE TWO NEGATIVE EFFECTS OF POOR LIGHTING.

There are many factors that disrupt the flow of transactions in a supply office. As a manager, you should be aware of every detail that causes a backlog in transactions and hurts your controlling factor. For example, the supply chief of any using unit in the FMF that has many customers during the course of a normal workday should position himself so he may completely observe all functions that are carried out in the office.

When reporting into a new unit or relocating the supply office, a manager should be aware of how a simple arrangement of office furniture, office machines, and functions performed by supply personnel can influence the effectiveness of the supply unit. The physical arrangement of desks within the office should be strategically placed to allow for a smooth flow of work. At some time in your career, you remember walking into a supply unit and having to walk to the rear of the office to start a transaction and having to walk by the many desks in the office interrupting everybody's work while going through. All supply offices have many customers who have to enter the office at some time during working hours. Depending on the location, the configuration of the office, and the type of support that the supply unit provides its customers with, the manager should position the desks so that the customers may enter causing minimal disruptions. Because of the various functions provided by an office, it may be practical to set up a counter where clerks can transact business with customers. This method will preclude the interruptions that would occur if customers were permitted to enter into the office. Personnel who have the least amount of business to transact with customers should be located the furthest away possible from visitors. On the other hand, a counter would be impractical for units that have few customers who transact business in the supply office.

Office machinery should be located so that it is close to people who use it. If a clerk has to walk from his desk to the office machine to use it, the clerk's concentration will be disrupted time and time again throughout the day.

When arranging an office to meet the needs of the customers and to provide a smooth flow of work, the manager must also ensure that there is adequate lighting for all clerks. Two negative effects caused by poor lighting are: first, a decrease in productivity; and secondly, a decrease in effectiveness. An individual that has to strain just to read a transaction presented on paper will never gain the concentration level or momentum needed to perform effectively.

Let's examine an effective office arrangement for a FMF using unit supply office. In studying the diagram below, note the ease of paper flow and controlling factor of the manager.

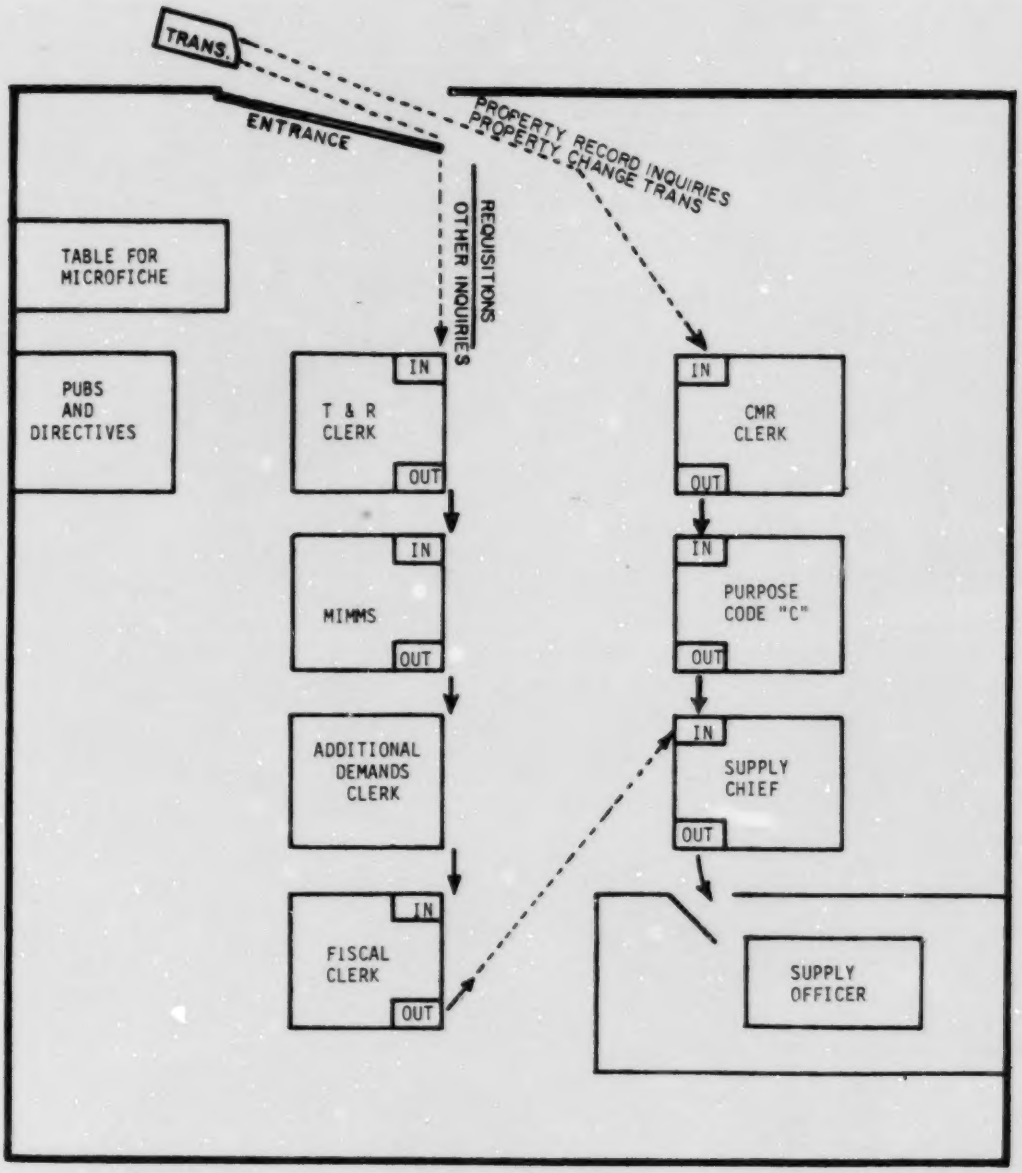


Fig 3-1. An effective office arrangement for an FMF supply office.

In the next diagram let's examine a supply office that has a counter top to accomodate a large number of customer inquiries.

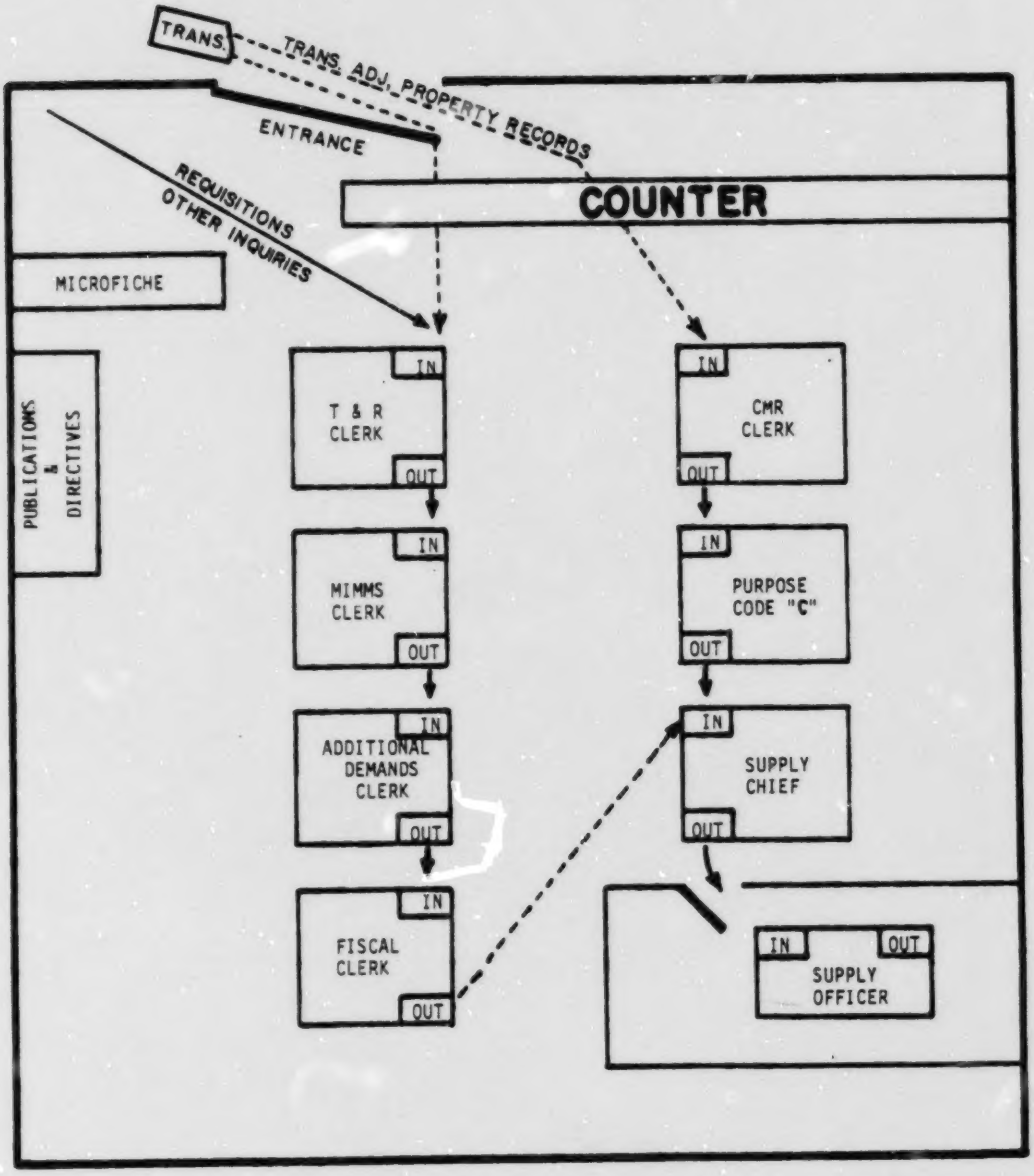


Fig 3-2. An effective office arrangement for an FMF supply office with a counter top.

EXERCISE: Answer the following questions and check your responses against those listed at the end of the study unit.

1. Describe why desks should be strategically placed within the office.

_____

2. State where office equipment should be located.

_____

3. List the two negative effects of poor lighting.

a. _____

b. _____

Work Unit 3-2. PAPER FLOW

STATE THE MAJOR CAUSE OF BACKLOGS IN TRANSACTION PROCESSING.

DESCRIBE THE FUNCTION OF A FLOW CHART AS IT RELATES TO THE PAPER FLOW.

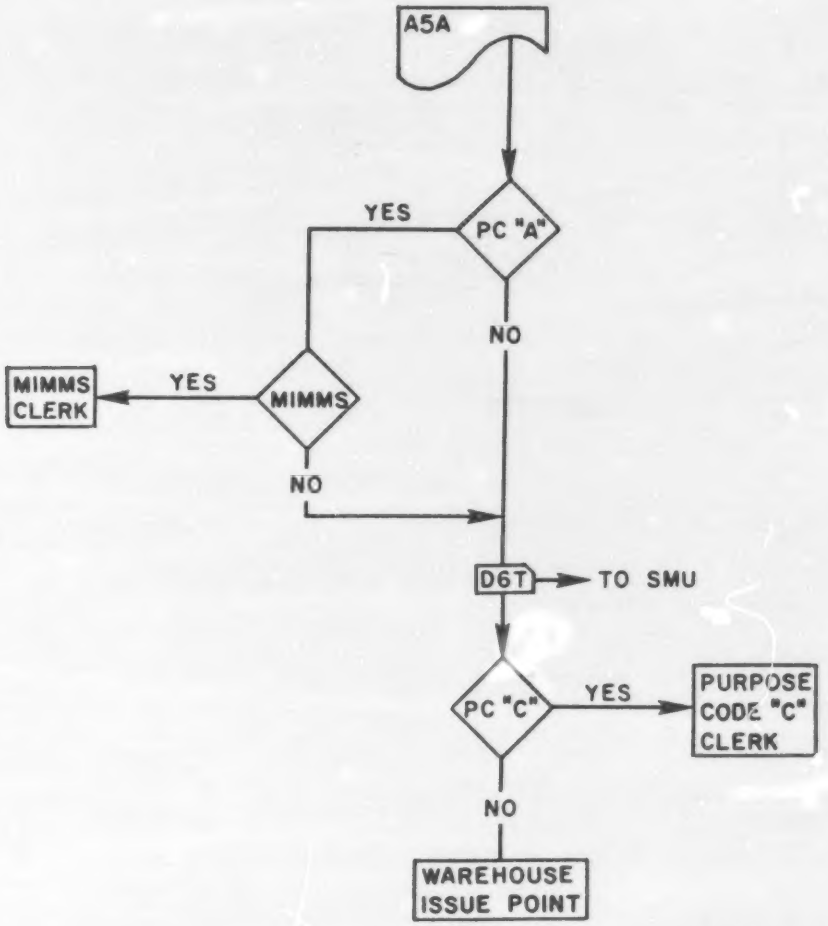
DESCRIBE THE FUNCTION OF DESK TOP PROCEDURES AS THEY RELATE TO PAPER FLOW.

Thus far we've seen how the arrangement of desks, office equipment, and lighting can adversely or favorably affect a smooth and efficient paper flow. These factors can also affect the level of backlogs. However, misrouting in the flow of documents is the major cause of backlogs in transaction processing. Because Loaded Unit Balance File (LUBF) exceptions are normally the result of failure to process the required transactions in a timely manner, the number of this type of exceptions can frequently be reduced by resolving problems in the flow of paperwork. Often, a clerk receives a transaction that is out of the normal routine. If not properly trained or instructed, the clerk will delay the processing of those transactions which are infrequently received. Many supply offices develop internal methods for correcting the backlogs in the processing of transactions. By devoting time for explanation during training periods, the manager can go over the many types of transactions that are received and explain how each transaction should be handled or processed. This method can be effective; however, it is best used in conjunction with flow charting. A flow chart can be used as a model to depict correct paper flow. A flow chart can also be a ready reference for clerks. It keeps the manager from having to stop each time a clerk is in doubt about the handling of a transaction. More importantly, a flow chart will cut down on the time delay caused by infrequently received transactions.

Another method of assisting the supply unit in adequately processing the paper flow is by the use of desk top procedures. Many commands make it mandatory for each clerk to establish and maintain desk top procedures. Even when desk top procedures are completed, many managers and clerks just file them away and break them out when an inspection team or someone asks to review them. Like a well constructed flow chart, well constructed desk top procedures will tell where documents come from, how they are processed, and where they are sent. This can be a vital asset to a clerk that has to fill in for another who is absent to prevent a delay in paper flow. The whole key to the effectiveness of flow charting and desk top procedures is to establish good ones and use them.

Let's examine the following flow chart of a using unit to show how it can assist the additional demands clerk while processing a receipt transaction. Remember to keep in mind that flow charting can be tailored to local requirements.

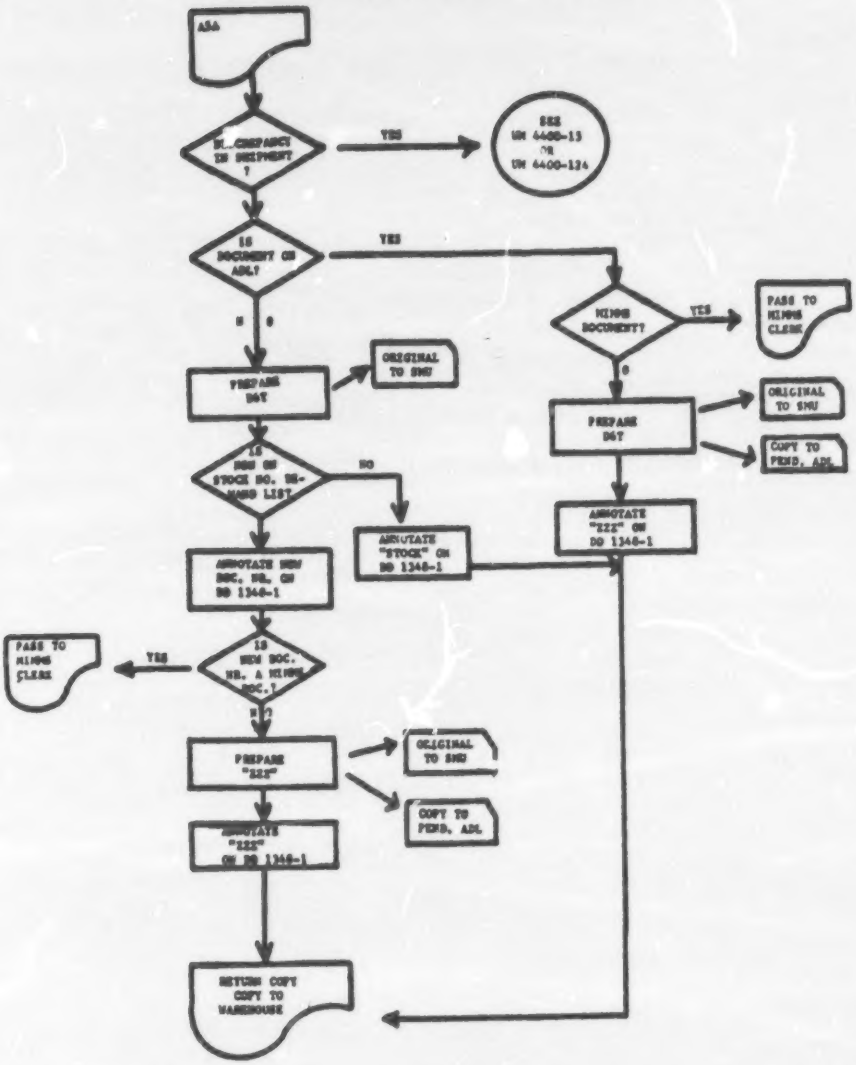
FLOW CHART
RECEIPT TRANSACTION



Note: For further training on the MIMMS clerk procedures, refer to MCI 30.21 MIMMS Procedures for the Supply Clerk.

Fig 3-3. Flow chart for the additional demands clerk for processing a receipt transaction.

FLOW CHART
RECEIPT TRANSACTION



Note: For further training on the MIMMS clerk procedures, refer to MCI 30.21 MIMMS Procedures for the Supply Clerk.

Fig 3-4. Flow chart for the additional demands clerk for processing a receipt transaction.

Figure 3-3 depicts the flow of a receipt transaction throughout the entire supply unit, and provides an understanding of the whole process. Figure 3-4 depicts how the Additional demands clerk processes the receipt transaction. It would be incorporated in the desk top procedures so the clerk is provided with detailed guidance.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. State the major cause of backlogs in transaction processing.

   _____

2. Describe the function of a flow chart as it relates to the paper flow.

   _____

3. Describe the function of desk top procedures as they relate to paper flow.

   _____

Work Unit 3-3. INTERNAL AND EXTERNAL COMMUNICATION DEFINED

NAME THE ACTIVITY THAT SHOULD DEMAND MOST OF A MANAGER'S TIME.

DEFINE EXTERNAL COMMUNICATION.

DEFINE INTERNAL COMMUNICATION.

Throughout the preceding study units, we've discussed fundamentals of management. These fundamentals contained two major objectives. First to help the manager to become more aware of his duties as a manager. Secondly, and most importantly, to free the manager from tedious, routine work in order to accomplish the responsibilities of his position. Let's now focus primarily on the role of the supply manager. The activities that should demand most of a manager's time are internal and external communications. A supply manager, responsible for the planning, directing, and controlling of activities from higher levels of authority to the lower levels of support, becomes a facilitator of communications between the two levels. The level of communications that exists within your office and with your customers can be defined as internal communications. The communications between your unit and higher supply echelons or other supply offices is defined as external communications.

Internal communications may be inter-office or intra-office. Inter-office communications with the customers of your supply account is essential to provide adequate supply support. Intra-office communication between functional areas, for example, the warehouse with the purpose code "C" clerk, is also frequently necessary for reconciliations, spot inventories, and clarifying transaction processing. The need for intra-office communication is the purpose for establishing good paper flow and good office arrangement. Both forms of internal communications should be encouraged by the manager. As the supply manager, you are constantly monitoring communications within your unit and with higher authority. Either form of communications can be oral, by written transactions, or by written correspondence. Regardless of the means of communication (internal or external), the supply chief becomes a facilitator for the unit. The supply officer will normally allow a subordinate to communicate externally only in exceptional cases. Otherwise, he not only takes himself out of the picture, but also loses the fundamental functions of directing and controlling in managing his organization.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. Name the activity that should demand most of a manager's time.

   _____.

2. Define external communications.

   _____.

3. Define internal communications.

Work Unit 3-4. TRAINING PERSONNEL

NAME THE TRAINING MODE THAT IS PREDOMINANT IN THE MARINE CORPS.

STATE WHAT IS A NECESSARY FACTOR FOR OBTAINING THE DESIRED RESULTS FROM ON-THE-JOB TRAINING.

LIST THE FIVE BASIC STEPS TO AN EFFECTIVE TRAINING PROGRAM.

Throughout the Marine Corps there are many formal schools that provide the basic and advanced technical skills to perform designated objectives. But, on-the-job training is the most predominantly utilized method of training in the Marine Corps. On-the-job training is often more effective than any other means of training. This is because on-the-job-training provides a trainee with authentic situations that will occur during the performance of his duties. As a supply chief, you may have had the opportunity to attend all the formal schools available to supply personnel. However, most of the knowledge you have gained comes from the experience of on-the-job training.

The one factor that is necessary to obtain the desired results from on-the-job training is a qualified trainer. It's most important that you, the supply manager, ensure that all supply personnel that receive on-the-job training are supervised by qualified trainers. A qualified trainer can be anyone who knows all the ins and outs of the job that is supervised. Many effectively operated supply units develop a training program whereby all individuals in the office and warehouse train each other in their respective duties by rotating personnel with an on-the-job training program. Many obvious advantages are obtained through this method. The unit does not lose personnel to go TAD for formal school, and the student will experience a realisitic training environment.

In any effective training program, there are five basic steps that should be observed:

Tell them. Explain each step of the task being taught.

Show them. Demonstrate how the task is accomplished.

They tell you. The subordinate explains the steps of task to you, the instructor.

They show you. The subordinate actually demonstrates his ability to accomplish the task.

Repetition. The subordinate repeats telling and showing you until the desired perfection is obtained.

All of these basic steps are important to ensure that the trainer and trainee thoroughly consider and understand the scope of duties associated with a job assignment. Ideally, all personnel would attend a formal school to acquaint themselves with the basic skills prior to reporting for duty.

It would be best to have a training program whereby each individual would be trained without loss of time on the job. Many supply managers are reluctant to pursue an internal training program because they fear that their personnel will lose valuable time performing their routine duties. However, the supply manager should note that trained personnel accomplish their duties more quickly and accurately leaving more time to conduct further training. When properly set up, a training program can not only train your personnel, but can work around normal, routine duties. There is much that can be said concerning training personnel; however, a simple understanding of the five basic steps and the use of a qualified trainer will accomplish most of the objectives of a successful on-the-job training program.

One of the best instructions available to a supply unit comes from those who inspect or conduct analysis of your account. All major commands normally have command inspection teams or SASSY management teams. These teams have a responsibility to ensure compliance with Marine Corps supply policies. Major commands also offer local training programs for supply specialties. FSMAO and major command teams are very resourseful in providing help where needed. Your supply personnel greatly benefit from the supply officer's and supply chief's enthusiasm in providing both on-the-job and outside training programs.

EXERCISE: Answer the following questions and check your responses against those listed at the end of the study unit.

1. Name the training mode that is predominant in the Marine Corps.

   _____

2. State what is a necessary factor for obtaining the desired results from on-the-job training.

   _____

3. List the five basic steps of an effective training program.

   a. _____

   b. _____

   c. _____

   d. _____

   e. _____

SUMMARY REVIEW

In this study unit you have become acquainted with the various factors to be considered in the physical arrangement of an office. You are now able to describe and understand the major cause of backlogs in paper flow and you can define and describe the channels of internal and external communications. You are now able to name the dominant mode of training personnel and the five steps of an effective training program.

Answers to Study Unit # 3 Exercises

Work Unit 3-1.

1. To reach a smooth flow of work.
2. Near the people who have greatest usage time.
3. a. Decrease in productivity
   b. Decrease in effectiveness

Work Unit 3-2.

1. Misrouting in document flow
2. Used as a model to depict correct paper flow
3. They will show where documents come from and where they are sent.

Work Unit 3-3.

1. Internal and external communications
2. Communication between your office and other offices
3. Communication within your unit

Work Unit 3-4.

1. On-the-job training
2. Qualified trainer
3. a. Tell them
   b. Show them
   c. They tell you
   d. They show you
   e. Repetition

STUDY UNIT 4

SETTING GOALS

STUDY UNIT OBJECTIVE: UPON SUCCESSFUL COMPLETION OF THIS STUDY UNIT YOU WILL BE ABLE TO IDENTIFY THE DEFINITION OF A GOAL AND THE DIFFERENCE BETWEEN A GOAL AND AN OBJECTIVE. IN ADDITION, YOU WILL BE ABLE TO IDENTIFY THE PURPOSE OF GOALS, AND THE METHODS OF MEASURING GOAL ACHIEVEMENT.

Work Unit 4-1. GOALS AND OBJECTIVES

DEFINE GOAL.

DESCRIBE WHAT A GOAL SHOULD SIGNIFY.

STATE HOW A GOAL CONTRASTS WITH AN OBJECTIVE AS IT RELATES TO TIME.

Thus far we've addressed the functions of management, the decision making process, and the organization and management of the supply office. We have seen what causes paper flow, backlogs, and how to reduce paper flow backlogs. We also have identified internal and external communications, and have named the dominant mode of training personnel. In this final study unit we will use those management techniques in setting effective goals.

Each manager in addition to planning, organizing and directing his unit toward measureable objectives, must establish goals. Goals are simply defined as accomplishments needed to meet organizational objectives. If your unit's objective is to prepare for deployment, you might establish such goals as the computation of quantities of equipment, ensuring adequate amounts of repair parts on hand to support the quantities of equipment that the property records reflect as on hand or on custody, and the requisitioning of shortages or the replacement of unserviceable items. In defining goals to accomplish organizational objectives, it should be understood that goals siginfy where you are going. In contrast to objectives, goals are short range whereas objectives are long range. Also, as stated above, one objective can contain many goals.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. Define goal.

_____

2. What should a goal signify?

_____

3. How does a goal contrasts with an objective as it relates to time?

_____

Work Unit 4-2. PURPOSE OF GOALS

STATE THE PRIMARY PURPOSE FOR SETTING GOALS.

DESCRIBE WHY A UNIT SHOULD BE GOAL ORIENTED RATHER THAN TASK ORIENTED.

In establishing goals for achieving an objective, you should keep in mind the primary purpose for setting goals: to facilitate achievement. Goals are like stepping stones that accomplish small or larger tasks that when combined will make the objective obtainable. Let's take, for example, study unit 3, where we discussed the paper flow backlogs. To reduce the problem of backlogs you should set up goals as well constructed desk top procedures, an organized desk arrangement, and flow charts. All of these goals together make it possible to obtain the objective of reducing backlog in paper flow.

Goals, combined with the management techniques of directing, planning, and controlling, will alleviate many delays and problems by identifying solutions and locating the source of the problem. Goals can be used to measure the distance to an objective and to identify problems in reaching the objective. In the planning stages of unit deployment, units would be faced with certain requirements for special clothing, special equipment, transportation, boxes, and administrative and operational supplies. In other words, goals serve to make routine matters combine to meet an objective.

Too many inexperienced managers schedule their time from day to day with a list of many tasks written on a tablet. These lists are often titled as "Things to Do" or "Things to Remember". The manager most frequently lists such items as:

1. Locate lost shipping mat for typewriters.

2. Make sure purpose code "C" clerk has issued fire extinguishers on custody.

3. Tell additional demands clerk which RO to reconcile next.

The above list that many supply managers produce to plan their time for the next day could be avoided by using the goals which will automatically eliminate these routine problems. An effective training program, desk top procedures, or assignment of such duties to responsible NCOs are some goals that can help.. While it's necessary for a supply manager to remind himself of his managerial tasks each day, he must avoid establishing a "task oriented unit", but rather establish a "goal oriented unit". Goals are accomplishments needed to reach organizational objectives. A goal oriented unit achieves results, whereas a task oriented unit disregards results because each task is like a fire, and they are constantly fighting fires. These fires spread in different directions each time so no objective is ever achieved or even visualized.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. State the primary purpose for setting goals.

_____

2. Describe why a unit should be goal oriented rather than task oriented.

_____

Work Unit 4-3. GOAL CHARACTERISTICS

STATE THE THREE CHARACTERISTICS OF A GOAL.

LIST THE THREE CHARACTERISTICS OF A MANAGER'S ORDER WHEN DIRECTING A UNIT TOWARD A GOAL.

STATE THE TWO TYPES OF GOALS A MANAGER CAN USE.

By simple observation of functional areas, screening reports and listings, and planning training commitments, a manager is able to determine the objectives that must be met. After objectives have been established, the manager's next step is to set the goals necessary to accomplish the organizational objectives. In considering the goals that will facilitate the achievement of the objectives, the goal must contain three characteristics. First, the goal must be meaningful. Ask yourself, "Does the goal have a definite and direct approach towards accomplishing the objective?" "Does the goal accomplish the needed requirements to meet the objective?"

The second characteristic of a goal is that it should be result oriented. Many times supply managers may set off to accomplish a goal that has no result at all, or generate other problems that need to be corrected. For example, your unit may be in desperate need of additional funding to support a large number of additional demands that are needed by the ordnance section for repairs. In a situation like this, the battalion commander may express great concern to the supply officer. Many supply chiefs will have the MAL clerk and additional demands clerk provide a long list of candidates (pending additional demands) for possible cancellation.

By submitting ZC1 transactions to request cancellation on pending SAC-1 deficiencies and selected back orders from the supply source, the manager has increased the possibility of coming up with the funds needed. However, the manager may have saved time and funds by simply requesting the additional funds from higher headquarters. If denied, then the above steps may become your only resource, but if this suddenly unbudgeted and unforeseen expense is approved, the manager would have saved time which could have been lost by the clerks having to reorder the deficiencies cancelled when funds become available later. Certainly, it is commonly considered good economy and policy by most major commands to reprogram funds, if possible, to support unforeseen deficiencies; however, it's not good policy to cancel additional demands when the need still exists.

The third characteristic is that the goal has to be achieveable. In considering any goal towards accomplishing the objective, be sure your unit has the means and capability to perform the tasks related to the goal. Also consider whether a goal can provide an achieveable result based on the unit's capability and mission. For example, your unit is a infantry battalion. Your unit does not possess materials handling equipment (fork lifts, etc.). Consequently, building larger boxes for mount out supplies as a goal may be achieveable, meaningful, and result oriented in a garrison situation, but will place restraints on the unit in training or combat operations. As a manager, a lot of thought should be given to avoid the adverse effects a minor goal may have on attaining an objective.

In addition to the three characteristics of a goal, you should keep in mind three characteristics of a manager's order when directing a unit toward the goal. They are the same as those discussed in the controlling function (work unit 1-15, Acceptable Controls).

The first characteristic is simple. All orders from the manager should be stated as simply as possible to avoid confusion or misinterpretation by subordinates. Secondly, a manager's order should be easily understood. You should assure that all orders are easily and completely understood before any subordinate is delegated responsibility. One way to ensure it is easily understood is to ask the individual who is delegated responsibility if he has any questions regarding his orders. And finally the order would be accepted as necessary. Ensure the importance of an order and always avoid assigning goals that are designed to keep troops busy. Busy work (work that has no results or meaning) should be for training periods that will be meaningful.

After close examination of the goals that have been selected, the manager should look at his personnel to determine which of the two types of goals to use--individual or unit goals. An individual type of goal would involve only one subordinate, or a few individuals assigned different goals that require individual expedience. In all cases, the manager can rely on the individual to carry out these goals because the goals are closely related to the subordinate's everyday routine duties, or the goals consist of tasks that require no direct supervision and assistance to complete. Unit goals are those goals assigned to the unit or a group of individuals (normally directly supervised by an NCO). Unit goals are normally smaller tasks that must be accomplished to meet unit objectives. Erection of tents and unloading of warehouse and office supplies are unit goals that must be accomplished in order to set up a field supply warehouse.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. State the three characterisitics of a goal.

   a. _____

   b. _____

   c. _____

2. List the three characteristics of a manager's order when directing a unit toward a goal.

   a. _____

   b. _____

   c. _____

3. State the two types of goals a manager can use.

   a. _____

   b. _____

Work Unit 4-4. HOW GOALS ASSIST SUBORDINATES

STATE HOW A GOAL ORIENTED UNIT ASSISTS SUBORDINATES.

DESCRIBE HOW SETTING A GOAL FOR A SUBORDINATE CAN ASSIST THE MANAGER IN HIS ADMINISTRATIVE DUTIES.

Once a manager has grasped the skills of management techniques and his unit is now moving towards objectives as a goal oriented unit, all of the people that are a part of this successfully run unit benefit in many ways.

As an experienced supply manager, you can recall the feeling of relief once a successful inspection or analysis is over. All the subordinates congratulate each other and discuss the final results of the inspection, and a new feeling of unity is shared among all the supply personnel. This feeling of unity can be regenerated time and time again by the accomplishment of goals, both individually and as a unit. In work unit 4-2 we saw that a goal oriented unit achieves results. Likewise, a goal oriented unit assists subordinates in helping them set personal work targets. A unit that prepares well for an inspection or analysis is goal oriented in order to reach the final objective of a favorable report. A unit or individual that sets his goals can better visualize where he is going, and in doing so, can readily indicate what personal work targets need to be set. A publication/research clerk sets the goal of ensuring all required publications are on hand or on valid requisition. He starts out by checking the unit T/E and determines each item the unit rates and its identification number (ID). The clerk is careful to determine that preferred, limited standard, and substandard items may be on hand and reflect different ID numbers. The clerk then sets personal work targets to reconcile the on hand publications with the reviewed listing of required publications that has been developed. Even before accomplishing the reconciliation, the clerk already knows what the work target will be. The clerk has become goal oriented, feels job satisfaction in his accomplishments, and is more willing to maintain the publications in a state of readiness.

Setting goals for a subordinate can assist the supply manager in his administrative duties. When subordinates have established goals, the manager will find it useful in his evaluation of the individual. The manager can better guide the subordinate towards goals by knowing where the subordinate should arrive at any given time. Using the goals that each individual or section has, the manager can visualize where breakdowns may occur. Controlling and directing come into play in correcting the breakdown and in steering the unit or individual toward the objective. When group discussions are conducted with all the supply personnel on matters of goals completed and assignments of new goals, it will help each individual toward a better understanding of their purpose in the section. It also assists in having a better overview of what is going on within the supply section and unit as a whole.

EXERCISE: Answer the following questions and check your responses against those listed at the end of this study unit.

1. State how a goal oriented unit assists a subordinate.

   _____

2. Describe how setting goals for a subordinate can assist the manager in his administrative duties.

   _____

Work Unit 4-5. MEASURING GOAL ACHIEVEMENT

DESCRIBE THE THREE METHODS USED TO MEASURE GOAL ACHIEVEMENT.

Once achieved by the subordinates, goals are reviewed for completeness and accuracy by the manager to insure that the unit is headed in the right direction. The review of these goals helps predict possible breakdowns and provides the manager with the necessary information in developing alternative solutions. The methods of measuring goal achievement are like that of controlling. Direct observation is used when the supply manager is able to afford the time to closely supervise or evaluate the personal work targets of an individual as the goal is being accomplished. Reports can be provided to the manager by transactions processed or noncommissioned officers assigned responsibility for controlling a particular functional area. Records, like reports, stem from the completion of transactions and are recorded on internal unit records.

All of these methods of measuring goal achievement provide the manager with the concise tools needed to properly manage by directing and controlling all functional areas toward the completion of goals and the accomplishment of objectives.

EXERCISE: Answer the following question and check your response against those listed at the end of this study unit.

1. Describe the three methods used to measure goal achievement.

   a. _____

   b. _____

   c. _____

SUMMARY REVIEW

In this study unit you have been taught the definition of a goal. You should now know the difference between a goal and an objective and how they relate to each other. You have seen how a goal oriented unit directs a unit towards its objective and provides both the subordinate and the manager with insight of where they are going and evaluation of their accomplishments.

Answers to Study Unit #4 Exercises

Work Unit 4-1.

1. Accomplishments needed to meet organizational objectives.
2. Where you are going.
3. A goal is short range whereas an objective is long range.

Work Unit 4-2.

1. Facilitate achievement.
2. A goal oriented unit achieves results, whereas a task oriented unit disregards results.

Work Unit 4-3.

1. Must be meaningful
   Result oriented
   Achieveable

2. Simple
   Easily understood
   Accepted as necessary

3. Unit
   Individual

Work Unit 4-4.

1. Helps subordinate set personal work targets.

2. Useful in evaluation of individual.

Work Unit 4-5.

1. Direct observation
   Reports
   Records

SUPPLY MANAGEMENT

Review Lesson

Instructions: This review lesson is designed to aid you in preparing for your final examination. You should try to complete this lesson without the aid of reference materials, but if you do not know an answer, look it up and remember what it is. The enclosed answer sheet must be filled out according to the instructions on its reverse side and mailed to MCI using the envelope provided. The questions you miss will be listed with references on a feedback sheet (MCI-R69), which will be mailed to your commanding officer with your final exam. You should study the reference material for the questions you missed before taking the final exam.

A. Matching: In the group of items below (items 1 to 4), match the function of management in column 1 with the appropriate definition in column 2. For each item, select the ONE letter (a, b, c, or d) indicating your choice. After the corresponding number on the answer sheet, blacken the appropriate circle.

Value: 1 point each

Column 1 Function of management	Column 2 Definition
1. Planning	a. Regulating the organization to ensure the achievement of goals and completion of the plan
2. Organizing	b. Where you want to go and how you will get there
3. Directing	c. To arrange elements into a whole of interdependent parts
4. Controlling	d. Activating the unit into motion

B. Multiple Choice: Select the ONE answer which BEST completes the statement or answers the question. After the corresponding number on the answer sheet, blacken the appropriate circle.

Value: 1 point each

5. Two characteristics of a beneficial plan are that it must be clearly defined and be economical. What are the other two characteristics?

   a. Accepted as necessary and uses specialists' expertise
   b. Simple and flexible
   c. Creative and logical
   d. Concise and brief

6. What time period is associated with long term planning?

   a. More than one year
   b. Two years or less
   c. Five years or longer
   d. Ten years maximum

7. What management level is concerned with long term planning?

   a. Regimental command level
   b. Squadron/battalion level
   c. CMC and DOD level
   d. First line supervisor level

8. What management level is concerned with short term planning?

   a. Regimental command level
   b. Squadron/battalion level
   c. CMC and DOD level
   d. First line supervisor level

9. The period of time associated with short term planning is

   a. more than five years.
   b. ten year maximum.
   c. immediate future.
   d. more than one year.

10. What is the level of management of the supply chief?

a. Regimental command level
b. Squadron/battalion level
c. CMC and DOD level
d. First line supervisor level

11. The two factors with which organizing is specifically concerned are

a. facts and opinions.
b. jobs and relationships among people.
c. motivating and demotivating.
d. understandability and acceptance as necessary.

12. Two principles of organization are the need for unity of command and the need to define the span of control. What are the other two?

a. Homogenous assignments and delegation of authority
b. Clear division of authority and fostering speedy action
c. Determining who must be consulted, and who must make a decision
d. Easily understood and accepted as necessary

13. Being simple, having a clear division of authority, and aiding speedy action are three advantages of a _____ _____ organization.

a. FMF
b. line
c. line and staff
d. base

14. Freeing executives of detail analysis and using specialists' expertise are two advantages of a _____ organization.

a. FMF
b. line
c. line and staff
d. base

15. Conflicting with line of authority and precluding specialists from implementing action are two disadvantages of a _____ organization.

a. FMF
b. line
c. line and staff
d. base

16. Negating the effort of specialists and overburdening key personnel are two disadvantages of a _____ organization.

a. FMF
b. line
c. line and staff
d. base

17. How is a unit put into motion?

a. By issuing orders or instructions
b. By motivating underqualified managers
c. By using the reward/punishment principle
d. By delegating responsibility

18. What is the one essential element to directing?

a. Motivating
b. Organizing
c. Punishment
d. Planning

19. The prime demotivator in directing personnel is

a. inadequate organization.
b. insufficient supplies.
c. a technically unqualified manager.
d. poor planning.

20. The prime motivator in directing personnel is

a. financial reward.
b. assignment of responsibility.
c. promotion.
d. reduced workload.

21. When a manager assigns responsibility, what are the three advantages in developing subordinates?

a. Motivation, knowledge, and skill
b. Initiative, skill, and competence
c. Skill, self-pride, and authority
d. Initiative, skill, and pride

22. Experience, competence and the desire for responsibility are three factors a subordinate should have when he is assigned responsibility. What are the other two factors?

a. Be able to handle subordinates and make good decisions
b. Be skillful and competent
c. Use strong leadership principles and desire responsibility
d. Not be overloaded with other work and possess judgement faculties to make decisions

23. What is the essential characteristic a subordinate must have to operate effectively?

a. Seniority over subordinates
b. Respect of subordinates
c. Manager's confidence
d. All necessary tools and supplies

24. What must a manager ensure an individual assigned a task has?

a. Seniority over subordinates
b. All relevant facts
c. Desire to do the job
d. Experience

25. In assigning responsibility, the manager must allow for

a. shortages in personnel.
b. lack of trained NCO's.
c. enough time to accomplish the task.
d. mistakes.

26. A manager may assign responsibility no further than

a. the manager's limit of authority.
b. the experience of the subordinate.
c. those matters pertaining to supply operations.
d. allowed by the rank of the individual.

27. What principal advantage does a manager obtain when he assigns responsibility to others?

a. Improves skills of subordinates
b. Demonstrates manager's abilities to subordinates
c. Provides himself with more time for other tasks
d. Gives increased productivity

28. Three characteristics of an acceptable control are:

a. simple, easily understood, and accepted as necessary.
b. the right decision, the desired results are achieved, and additional action is done as required.
c. must be meaningful, result oriented, and achievable.
d. clearly defined, flexible, and economical.

29. The amount and type of control is determined by

a. each individual situation.
b. your experience in this area.
c. the time limits imposed.
d. the number of subordinates assigned.

30. When is the control function implemented?

a. During performance of the task
b. During task planning
c. After the task is completed
d. During the organization phase

31. What are the three means of control?

a. Delegation of authority, meetings, and reports
b. Direct observation, reports, and records
c. Feedback, reports, and meetings
d. Assigning responsibility, records, and reports

32. Personnel and inefficiency are two forms of problems that will confront a manager. What is the other one?

a. Equipment
b. Breakdown in operations
c. Enough supplies
d. Budget

33. Before a problem can be defined, what must a manager initially accomplish?

a. Consult subordinates
b. Investigate the facts
c. Analyze the situation
d. Gather all relevant data

34. What two types of data are associated with problem solving?

a. Facts and opinions
b. Records and reports
c. Logic and creativity
d. Logic and suggestions

35. Defining specifications is a point that must be considered in problem

a. definition.
b. development.
c. analysis.
d. solution.

36. Why must a manager develop more than one solution to a problem?

a. To consider all the facts
b. To find the best solution
c. To acknowledge each subordinate
d. To evaluate individual performance

37. What two traps does developing alternative solutions help a manager avoid?

a. Excessive records and reports
b. Planning for too short or too long a term
c. Inaccurate feedback
d. Obvious and either/or solutions

38. What are the three sources a manager can use to develop solutions?

a. Jobs, relationships among people, and functions
b. Records, reports, and directives
c. Experience, logic, and creativity
d. Initiative, skill, and competence

39. Direction from higher authority and limited materials are two factors that limit a manager's discretion in developing alternative solutions. What is the other one?

a. Dry run of the solution
b. Fiscal limitations
c. Time
d. Other duties

40. The two barriers to a manager's creativity are

a. fear and habit.
b. experience and logic.
c. organization and chain of command.
d. detailed analysis and use of specialists

41. What two factors should a manager consider in choosing a solution?

a. Will the solution solve the problem, and are the means available.
b. Is the decision the right one, and are the results being achieved.
c. Is additional action required, and are all reports completed.
d. Where documents come from, and where they go.

42. In choosing the best solution the two primary considerations are

a. cost and manpower required.
b. urgency and availability of funds.
c. simplicity and flexibility.
d. greatest results with least effort.

43. The essential quality, in selecting the best solution, is that it must be

a. logical.
b. flexible.
c. creative.
d. economical.

44. Two methods for obtaining feedback are

a. personal checks and periodic reports.
b. increases in productivity and effectiveness.
c. units and individuals.
d. directives and memorandums.

45. In addition to telling the manager whether the decision is the right one and if the desired results are being achieved, what question does feedback answer for the manager?

a. Was the plan logical?
b. Is the plan economical?
c. Is additional action required?
d. Will a report be required?

C. Matching: In the group of items below (items 46 to 49), match the term in coulmn 1 with the appropriate definition in column 2. For each item, select the ONE letter (a,b,c, or d) indicating your choice. After the corresponding number on the answer sheet, blacken the appropriate circle.

Value: 1 point each

Column 1	Column 2
Term	Definition
46. Feedback	a. Accomplishments needed to meet organizational objectives
47. External communication	b. Means of finding out how the decision is working
48. Internal communication	c. Information traveling between your office and other offices
49. Goal	d. Information traveling within your unit

D. Multiple Choice: Select the ONE answer which BEST completes the statement or answers the question. After the corresponding number on the answer sheet, blacken the appropriate circle.

Value: 1 point each

50. Why should desks be strategically placed within an office?

a. To reduce office size to a minimum
b. To produce a smooth flow of work
c. To place personnel in order of seniority
d. To aid the manager in observing workflow

51. Where should office equipment be located in an office?

a. Toward the front of the office
b. Toward the rear of the office
c. Near the customer counter
d. Near the people who use it most

52. Poor lighting has an effect on

a. planning and organization.
b. records and reports.
c. productivity and effectiveness.
d. communications and movement.

53. The major cause of backlogs in transaction processing is

a. requests for unneeded material.
b. misrouting in document flow.
c. uncompleted forms.
d. communication with other offices.

54. How does a flow chart aid the paper flow in an office?

a. Acts as a model to show correct paper flow
b. Prevents breakdowns
c. Labels each work station with its function
d. Prevents lost transactions

55. What does a desk top procedure tell you about documents?

a. The major categories under which they are filed
b. The topics and organization of their subsections
c. Where they come from and where they are sent to
d. How they relate to the general workflow of the office

56. What activity should demand most of a manager's time?

a. Training
b. Long range planning
c. Communications
d. Organizing

57. The type of training that is most frequently used in the Marine Corps is

a. formal schools.
b. correspondence courses.
c. on-the-job training.
d. other service schools.

58. What is the most critical factor in getting good results from on-the-job training?

a. Intelligent students
b. Qualified instructors
c. Well organized material
d. A quiet work area

59. In the list of the five basic steps for effective training, what is the last step?

a. Show them
b. They show you
c. Tell them
d. Repetition

60. What should a goal signify?

a. Where you are going
b. Where you have been
c. How you are going there
d. The steps for getting there

61. In relation to time, how does a goal compare with an objective?

a. Goals are short range, and objectives are long range.
b. Objectives are short range, and goals are long range.
c. Both goals and objectives deal with long range planning.
d. Both goals and objectives deal with short range planning.

62. What is the primary purpose for setting goals?

a. To find out how well the plan is working
b. To help get the job done
c. To assist in preparing reports of what has been done
d. To keep a record of how the job was done

63. Why should a unit be goal oriented rather than task oriented?

a. A goal oriented unit gets results.
b. A task oriented unit gets results.
c. A goal oriented unit disregards results.
d. A task oriented unit accomplishes the mission.

64. The three characteristics of a goal are

a. initiative, skill, and competence.
b. simple, clear authority, and aids speedy action.
c. clear definition, simplicity, and flexibility.
d. meaningful, result oriented, and achievable.

65. The three characteristics of a manager's order for a goal directed unit are that it be simple, easily understood, and

a. flexible.
b. accepted as necessary.
c. written and published.
d. approved by higher authority.

66. What are the two types of goals a manager can use?

a. Unit and individual
b. Immediate and long term
c. General and specific
d. Broad and narrow

67. How does having a goal oriented unit help subordinates?

a. Makes their work easier
b. Allows flexibility in job assignments
c. Makes rating the work fairer
d. Helps them set personal work targets

68. How does setting subordinate goals help the manager in his administrative duties?

a. Helps him evaluate the subordinate
b. Sets priorities for him
c. Allows for equal work distribution
d. Permits job transfer when personnel are absent

69. In addition to reports and records, what is the third method of measuring goal achievement?

a. S.O.P.
b. Turnover folder
c. Efficiency ratings
d. Direct observation

Total Points: 69

* * *

COURSE IMPROVEMENT SURVEY

The Marine Corps Institute would appreciate your help in improving the course you have just completed. If you would take a few minutes to complete the following survey, we would have valuable information to help us improve this course. Your answers will be kept confidential and will in no way affect your grade.

Course Number [ ] Rank_____ MOS_____

Name (Optional) _____

Military Address (Optional) _____

1. Did you find inaccurate or outdated information in this course? ☐ Yes ☐ No

   List the areas you found inaccurate or out of date. Give page or paragraph if possible.

   _____

   _____

   _____

2. How long did it take you to finish the course?

   ☐ 1-5 hours ☐ 6-10 hours ☐ 11-15 hours ☐ 16-20 hours ☐ More than 20 hours

3. Were the procedures taught in this course understandable and useful? ☐ Yes ☐ No

   If "No," how could they be improved? _____

   _____

4. How much of the material taught in this course can you apply to your job?

   ☐ Almost all ☐ More than half ☐ Very little ☐ Less than half ☐ None

5. Did you have trouble reading or understanding the material in this course? ☐ Yes ☐ No

   If "Yes," explain_____

6. Were the illustrations in this course helpful? ☐ Yes ☐ No

   If "No," how could they be improved?_____

7. Put an "X" in a box on the scale below to show how well you feel the lessons and the course materials prepared you for the final examination. (On this scale "10" indicates that the material prepared you very well, a "5" indicates adequate preparation, and a "1" indicates very poor preparation.)

Very Poor				Adequate					Very Well
1	2	3	4	5	6	7	8	9	10

8. If you asked MCI for help, were the answers to your questions helpful?

   ☐ Yes ☐ No ☐ No questions sent to MCI

9. Please list below any suggestions you may have to improve this course. Try to be specific; give page or paragraph numbers. (You may also use the space on the back or attach additional sheets.)

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T&E-1

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